

**Exploring the experiences in mainstream schools with the
implementation of the *Policy on Screening, Identification,
Assessment and Support (2014)***

by

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DECLARATION

I, the undersigned, sincerely declare that this dissertation submitted in fulfilment of the degree

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SUMMARY

The aim of this qualitative study was to explore the experiences in mainstream schools with the implementation of the *Policy on Screening, Identification, Assessment and Support (SIAS policy)* of 2014. As I was interested in discovering reality through the experiences of members of the School-Based Support Team (SBST), my study was informed by interpretivism. Premised on interpretivism as my paradigmatic orientation, I focused on the participants' multiple experiences with interpretations of the *SIAS policy*. In order to realise the research aim, my study evolved through logically sequenced chapters. Although the chapters are interrelated, each chapter responded to a specific research question and objective, and involved a particular research method.

A literature review enabled a conceptual understanding of a global perspective on disability, the international treaties on inclusion and various theories on inclusion. Against my understanding of the *medical model of disability*, the *social model of disability*, the *theory of full-inclusion* and the *theory of inclusive special education*, I considered how inclusive education is implemented in four countries. I concentrated on two developing countries in the global south, namely Zimbabwe and Lesotho, and two developed countries, namely Finland and Italy. To contextualise the study, I give a brief overview of the trajectory of inclusive education in South Africa. After South Africa became a democracy in 1994, its position on inclusive education shifted from the *medical model of disability* to the *social model of disability*. As such, attempts were prompted to reduce the barriers found in society for those with disabilities. This attempt resulted in the enactment of various education policies aimed at the inclusion of all learners in education.

A document analysis was undertaken to foreground a policy framework for inclusive education. The framework consists of the *Constitution of the Republic of South Africa* (1996), the *South African Schools Act* (1996), the *National Education Policy Act* (1996), and *Education White Paper 6: Building an Inclusive Education and Training System* (2001). The commonality in all of these documents is the advancement of inclusion. In drawing on this legislative framework, I was able to position the *SIAS policy* in relation to the fundamental principles that drive inclusive education in South Africa.

In order to explore the experiences in mainstream schools with the implementation of the *SIAS* policy, I conducted focus group interviews with members of the SBST's and semi-structured interviews with vice-principals of three primary schools. These schools varied in terms of their quintile categorisation, ranging from quintile level 3 to 5. The findings centred on themes relating to the *SIAS* process, challenges experienced by the schools and recommendations for a more sufficient implementation of the *SIAS* process. The findings revealed challenges such as insufficient school readiness, a lack of parental involvement, elongated processes, teacher's attitudes and inadequate resources. The need to simplify the forms of the *SIAS* process, and the need for in-service training were brought to the fore.

Based on the findings of this study, I made suggestions for improved resources provisioning, skills development for teaching staff who are required to support learners who experience barriers to learning, and the strengthening of relationships between the school and the DBE, and also with parents. In addition to providing some insight in the experiences in mainstream schools with the implementation of the *SIAS policy*, the study also implicates an existing gap between policy expectations and school realities.

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ABBREVIATIONS AND ACRONYMS

DBE	Department of Basic Education
DoE	Department of Education
DBST	District Based Support Team
DoJ&CD	Department of Justice and Constitutional Development
EFA	World Conference on Education for All
FSS	Full-Service Schools
IDDC	International Disability and Development Consortium
ILST	Institution Level Support Teams
IEP	Individual Education Plan
ISP	Individual Support Plan
MOET	Ministry of Education and Training
NEPA	National Education Policy Act
SASA	South African Schools Act
SBST	School-Based Support Team
SIAS	Screening, Identification, Assessment and Support
SNA 1	Support Needs Assessment form 1
SNA 2	Support Needs Assessment form 2
SSRC	Special Schools as Resource Centres
UN	United Nations
UNCRPD	United Nations Convention of Rights of Persons with Disabilities
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organisation
WHO	World Health Organisation

CHAPTER 1: ORIENTATION

1.1 INTRODUCTION

In 2011, following the *World Health Survey*, the *World Health Organization* (WHO) estimated that 80% of children worldwide, who have some form of disability, live in developing countries like South Africa (WHO, 2011). This survey (WHO, 2011) also found that an average of 50,6% of boys and 41,7% of girls with a disability complete primary school, which is an average of 10% lower than their peers who do not have a disability. South Africa's ratification of the *United Nations Convention on the Rights of the Child* in 1995, together with the *United Nations Convention of Rights of Persons with Disabilities* (UNCRPD) in 2007, signified a paradigm shift as the country now recognises disability as a human rights issue, rather than a social welfare issue (UNICEF, 2012). Article 24 of the UNCRPD calls for all signatory governments to impose access to free and compulsory basic education to ensure that no child is excluded from the education system. By implication, the South African government was required to reform its educational system through policy development in order to promote inclusive education.

The *United Nations Educational, Scientific and Cultural Organisation* (UNESCO, 2009) perceives inclusive education as a quality issue that is premised on the idea that inclusion is reciprocal and that access and quality are linked in order to ensure inclusive education. The *Council of the European Union* (2010) also notes that moving towards inclusive policy practices on an international level is essential for the inclusion of learners with special needs who find themselves in mainstream settings. The context of inclusive education, whether national or international, involves examining the different values and goals within a system. By implication, inclusive education requires an understanding of the sociocultural contexts within which it is expected to be implemented, and demands multidimensional transformation of schooling systems (Miles & Singal, 2009; Naraian, 2013).

In South Africa, the *South African Child Gauge* (2018) indicates that 98% of children between the ages of seven and 17 attended school in 2017, and that one of the reasons for non-attendance was disability. The *Global Citizen* reported that discrimination against and a lack of accessible schools for learners who experience barriers to learning, together with a lack of training in inclusive teaching methods, contribute to learners with disabilities not attending school (Rueckert, 2018). Other factors that might complicate the issue of

accessibility for disabled learners were foregrounded in 2013 by the *International Disability and Development Consortium* (IDDC). It was found that learners with disabilities from developing countries are confronted with a curriculum that has not been adapted to their educational needs, and that teachers have a lack of knowledge and skills when having to accommodate learners' disabilities (IDDC, 2013).

Many countries have committed to adopting an inclusive education philosophy. In South Africa, the *Education White Paper 6 Special Needs Education: Building an Inclusive Education and Training System* (White Paper 6) was adopted in 2001 with the aim to extend the policy foundations, frameworks and programmes of existing policy for all bands of education and training. This is so that our education and training system will recognise and accommodate the diverse range of learning needs (RSA DoE, 2001: Section 2(2.1.1)).

The enactment of *White Paper 6* aligns with the entrenched right of all children to have access to education as stipulated in Section 29(1)(a) of the *Constitution of the Republic of South Africa* (RSA, 1996). Subsequently, the right to access education creates a legal obligation for the South African government to ensure that children who experience barriers to learning enjoy equal and inclusive education through the enforced implementation of White Paper 6.

1.2 RESEARCH INTEREST, RESEARCH QUESTION AND SUB-QUESTIONS

In order to ensure that an education system creates equal educational opportunities and promotes effective learning for all learners, the recognition of equal entitlement to education as a basic right needs to be emphasised (Ainscow, Booth & Dyson, 2010). While the *Constitution of the Republic of South Africa* states that "everyone has the right to basic education" (RSA, 1996a: Section 29(1)(a)), the *South African Schools Act (SASA) 84 of 1996* (RSA 1996b, Section 5(1)) underscores the right to basic education in that a "public school must admit learners and serve their educational requirements without unfairly discriminating in any way". The development of transformative education programmes to promote inclusive education and training systems subsequently became a national imperative and led, as mentioned, to the publication of *White Paper 6* in 2001. The aim of the *White Paper 6* was to provide educational opportunities for learners who experience barriers to learning. At that time the Ministry acknowledged that an extensive range of learning barriers, which include factors like physical, neurological, mental, developmental and sensory impairments, can exist at any point in time among the learner

population (RSA DoE, 2001). The assumption is that if learner needs are not met, their exclusion from the education system is imminent.

No policies or guidelines that aim to promote special needs education can guarantee that the implementation of inclusive education will be effective. Rather, as noted by DeGroff and Cargo (2009), a government's decisions need to be transformed into specific programs, procedures, regulations and practices aimed at social betterment. Within the South African context, as a signatory of the protocols of UNCRPD, the government in 2007 reaffirmed its commitment to ensure that all people, regardless of the nature of their disability, are able to enjoy all human rights and fundamental freedoms. This particular commitment was further strengthened in 2014 when a *Policy on Screening, Identification, Assessment and Support (SIAS policy)* for mainstream, full-service and special needs schools, was announced. The *SIAS* policy is considered a key procedure in transforming the education system into

a fully inclusive education system which makes it possible for every child with a disability to have access to an inclusive, quality and free primary education, and secondary education on an equal basis with others in the communities in which they live (RSA DBE, 2014: Section 4(2)).

While the *SIAS* policy aligns with the prescripts of *White Paper 6* with regard to inclusive education in providing support to learners and educators, it has the intention to provide a particular policy framework. This policy framework specifically relates to

the standardisation of the procedures to identify, assess and provide programmes for all learners who require additional support to enhance their participation and inclusion in school (RSA DBE, 2014: Section 1(1)).

It can therefore be accepted that the *SIAS* policy is significant in that it attempts to assist in addressing various issues that hamper the achieving of inclusion goals, namely a lack of early learning barrier identification strategies, tools for assessing learners' strengths and weaknesses and a lack of individual support plans (Geldenhuys & Wevers, 2013).

However, inclusive education policies still face considerable challenges as they tend to focus on individuals with disabilities rather than on a wider range of barriers to learning (*cf.* Murungi, 2015). Even though many countries have been able to successfully implement an inclusive educational system for all learners, South Africa is still trying to achieve this goal

(Nguyet & Ha, 2010). In 2012, Chataika, Mckenzie, Swart and Lyner-Cleophas suggested that a lack of teaching skills with regard to adapting the curriculum to suit the needs of learners who experience barriers to learning, is responsible for the unsuccessful implementation of inclusion policies in South Africa. Engelbrecht (2018) is also of the opinion that despite the development of various implementation guidelines following the ratification of the *United Nations Convention of Rights of Persons with Disabilities* in 2007, schools still face interrelated issues that impact the implementation of inclusive educational policies. Continued discrepancies regarding the interpretation of the concept of inclusive education, is one of the concerns with regard to policy implementation. This includes teachers' understanding of the way in which inclusive education should be implemented in the classroom (Engelbrecht, 2018).

Despite the commitment from the Department of Education to deliver quality education to all learners, Ngwena (2013) suggests that the South African government has been struggling to implement its inclusive education program due to a lack of enforcement and available resources. The need also exists amongst teachers for policy frameworks that will empower them with tools to cater for a comprehensive range of learning needs (Chataika *et al.*, 2012). In this regard, the *SIAS* policy was created to provide a standardised policy framework which enables teachers to screen, identify, assess and support "learners who experience barriers to learning within the framework of the *National Curriculum Statement Grades R-12*" (RSA DBE, 2014: Section 1(3)). However the implementation of the policy has not previously been extensively researched, as it is a fairly recent enacted policy. To date little research has been undertaken on the implementation of all four the main components of the *SIAS* policy in mainstream primary schools. Searches on the databases SA ePublications, Africa-Wide Information, Academic Search and ERIC revealed that the available information centres on issues that relate to inclusive education and how the *SIAS* policy correlates with White Paper 6 and SASA are limited. As a result, I became interested in the implementation of the *SIAS* policy, hence my research question: *What are the experiences in mainstream schools with the implementation of the Policy on Screening, Identification, Assessment and Support of 2014?*

To answer my research question, the following subsidiary questions were identified:

1.2.1 How is inclusive education conceptualised internationally and contextualised in South Africa?

- 1.2.2 What is the South African policy framework for inclusive education and how is the *Policy on Screening, Identification, Assessment and Support* positioned within this framework?
- 1.2.3 What are the experiences in mainstream schools with the implementation of the *Policy on Screening, Identification, Assessment and Support*?
- 1.2.4. What comments and suggestions can be made regarding the implementation of the *Policy on Screening, Identification, Assessment and Support* in mainstream schools?

1.3 RESEARCH AIM AND OBJECTIVES

In alignment with the research questions, the aim of this study is to explore the experiences in mainstream schools with the implementation of the *SIAS* policy of 2014. In order to realise this aim, I plan to

- 1.3.1 unpack how inclusive education is conceptualised on an international level and contextualised in South Africa by doing a literature review;
- 1.3.2. foreground the South African policy framework for inclusive education and to position the *Policy on Screening, Identification, Assessment and Support* in this framework through document analysis;
- 1.3.3 explore the experiences of mainstream schools with the implementation of the *Policy on Screening, Identification, Assessment and Support* by conducting focus group discussions and semi-structured interviews; and
- 1.3.4 comment on and make suggestions regarding the experiences of mainstream schools with the implementation of the *Policy on Screening, Identification, Assessment and Support*.

1.4 RESEARCH PARADIGM

Research paradigms define the philosophical orientation of a researcher which has implications for the decisions that are made in the research process (Kivunja & Kivunja, 2017). For Denzin and Lincoln (2011), a research paradigm can be perceived as human constructions consisting of philosophical assumptions which are essential to the research design. According to Creswell (2012; Nieuwenhuis, 2016), the direction of a study is shaped, together with a researcher's own world view, by certain philosophical assumptions referred to as ontology, epistemology, axiology and methodology. Ontology refers to a perception of reality and an ontological question would typically be: what is real? (Nieuwenhuis, 2016). Ontological questions enable the researcher to determine "[w]hether

or not social reality exists independently of human conceptions and interpretations”, and “[w]hether there is a common, shared, social reality or just multiple context-specific realities” (Nieuwenhuis, 2016: 117). While ontological assumptions refer to what is real, epistemological assumptions relate to the assumed nature of knowledge, how knowledge is obtained, and how it is communicated to others (Cooksey & McDonald, 2011; Nieuwenhuis, 2016). Creswell (2012; Mertens, 2010) refers to axiology as the role of a researcher’s values in the research process - does the researcher actively report his or her values and biases during the process? Methodology is described by Hesse-Biber and Leavy (2011) as a bridge between the researcher’s philosophical position and the chosen research methods. The focus and intent of research and research questions are therefore shaped by methodology, which forms an essential part of the research process (Mertens, 2010). Methodology serves as a strategic guide and includes a set of systematic techniques that describe methods which are used to guide research (Lodico, Spaulding & Voegtle, 2010).

Certain paradigms are associated with certain methodologies, and the interpretivist paradigm generally utilizes a qualitative methodology (Chilisa, 2011; Kawulich, 2011). This study is informed by the interpretivist paradigm, which aims to discover reality through the experiences of research participants (*cf.* Yanow & Schwartz-Shea, 2011). In my study I will proceed from the ontological assumption that multiple social constructed realities exist in a given situation, and that reality cannot be generalised (*cf.* Chilisa, 2011; Kawulich, 2011). By implication, I agree with Nieuwenhuis (2016) that human life can only be understood from the inside, and that experiences are constructed in a subjective way. This assumption is of particular importance to me as I am interested in gaining an understanding of the experiences of stakeholders in mainstream schools regarding the implementation of the *SIAS* policy. While the ontological assumption of interpretivism centers on reality as perceived as inter-subjective, its epistemological assumptions are based on meanings and understandings on a social level (Dudovskiy, 2018). Within the interpretivist paradigm, knowledge is subjective as it is socially constructed and mind-dependent (Chilisa & Kawulich, 2011). Throughout my study, I need to bear in mind that whereas multiple realities and perceptions exist within the same context, the participants’ experiences differ in relation to the implementation of the *SIAS* policy. Axiology within interpretivism is value bound, and the researcher is always part of that which is being researched (*cf.* Saunders, Lewis & Thornhill, 2012). Even though my personal values will undoubtedly influence the research process, it is important that I adhere to the core values of research as set by the

European Science Foundation and All European Academies of 2011. These values include objectivity, honesty, openness, accountability, fairness and stewardship. I also need to understand that the participants in the study are individuals with their own individual thoughts and interpretations regarding the implementation of the *S/AS* policy. Different research methods such as focus group discussions and individual interviews will enable me to explore the perceptions of various stakeholders with regard to their experiences with the implementation of the *S/AS* policy.

The aim of interpretive research - to understand people's experiences - is subsequently guided by the assumption that multiple realities exist within a given situation. My decision to be guided by this paradigm is informed by the assumption that multiple realities often lead to a more extensive understanding of a situation in that interpretivism provides in-depth information (Morehouse, 2011). The possibility of gaining an in-depth understanding of the experiences of various role players with the implementation of the *S/AS* policy subsequently influenced my decision to work with the interpretivist paradigm.

1.5 RESEARCH DESIGN

A research design is a conceptual blueprint within which a researcher conducts a study (Akhtar, 2016). Creswell (2014) also points out that research design is a particular set of procedures and methods used in research that specify the ways in which data is collected and analysed. While a good research design is characterised by being flexible, efficient and appropriate (Mustafa, 2010), its quality is determined by choosing an applicable research methodology (Kothari, 2010).

1.5.1 Research methodology

As indicated, a research methodology constitutes the bridge that brings one's philosophical standpoint(s) and method(s) together. There is therefore a close relationship between a research paradigm and a research methodology. As noted by Creswell (2014), the choice of a research paradigm determines the particular approach or methodology that will be used in a study. McGregor and Murname (2010) emphasise the importance for a researcher to clarify his or her choice of methodology and its applicable principles from the onset of a research undertaking. Such clarification is particularly important as it informs the selection and use of specific research methods in a study. Consequently, clarifying one's research methodology, in turn clarifies all procedures used to collect and analyse data throughout the research process (*cf.* Hesse-Biber & Leavy, 2011).

Traditionally a distinction is made between three approaches to research, namely qualitative research, quantitative research and mixed methods research (Creswell, 2013; Mertens, 2010). Nieuwenhuis (2016) explains that qualitative research is subjective in nature and usually makes use of inductive reasoning in order to construct a valid argument, which includes findings that are not generalisable. Quantitative research is different from qualitative research because it is more likely to be objective in nature and makes use of deductive reasoning methods to provide findings which can be generalised (Nieuwenhuis, 2016). The aim of a qualitative study is to answer 'why' and 'how' questions, whereas quantitative research focuses more on cause and effect and numeric correlations (Maudsley, 2011). Combining qualitative and quantitative methods to collect and analyse data in the same study is considered as a mixed methods approach or methodology (Bowers, Cohen, Elliot, Gabowski, Fishman, Sharkey, Zimmerman & Horn, 2013). Johnson, Onwuegbuzie and Turner (2007: p. 112) refer to mixed methods research as "the class of research where the researcher mixes or combines quantitative and qualitative research techniques, methods, approaches, concepts or language in a study or single set of related studies". Although when conducting multi-method research, the focus is more on research methods than on philosophical considerations (Creswell, 2013). Philosophical assumptions do still play a vital role as they inform the choice of methodology, which in turn guides the selection of research methods (*cf.* Long, 2014).

This study was qualitative in nature and an interpretive qualitative design was used. According to Berg (2012; Hesse-Biber & Leavy, 2011), a qualitative study is characterised by three interconnected key elements that have an effect on the research process, namely the type of research design, the method of data collection and the method(s) of analysis. Hesse-Biber and Leavy (2011) explain that the objective of qualitative research is to extract meaning from data gathered through experiences, circumstances and situations in order to better understand phenomena. In alignment with this aim, qualitative research is also naturalistic in nature in that the focus is placed on the natural settings in which interaction between individuals and their surroundings take place (Berg, 2012). The advantage of a qualitative study is that, with regard to my research topic, reference could be drawn from both the perspectives of the participants, obtained through the focus group discussions and semi-structured interviews, but also from the information collected through the literature review and data generated by a document analysis. As such, I was in a position to generate knowledge throughout the research process (*cf.* Hesse-Biber & Leavy, 2011).

Although qualitative in nature, my study was exploratory in the sense that I explored a topic on which no research has yet been undertaken (*cf.* 1.2). While “[e]xploratory research is the initial research which forms the basis of more conclusive research” (Singh, 2007: 64), the aim of my study was not to provide conclusive evidence, but to provide information on a topic that has not been explored, namely the implementation of the *S/IAS* policy (*cf.* Saunders, Lewis & Thornhill, 2012). As a research methodology puts a paradigm into motion and connects research to specific methods, I selected specific methods that are associated with a qualitative approach.

1.5.2 Research methods

McGregor and Murname (2010) define research methods as tools used in research which are shaped by methodology. While methods refer to techniques, a research methodology or research approach constitutes the foundation that contributes toward understanding the determinants that influence the effectiveness of the methods applied in a study (Tariq & Woodman, 2013). The methods I used in my study included a literature review, document analysis, focus group interviews and semi-structured individual interviews (see Table 1.1). The table below indicates the objective of each of the research methods used in this study.

Table 1.1: Research objectives and concomitant research methods

Objective	Research method
To unpack how inclusive education is conceptualised on an international level and contextualised in South Africa	Literature review
To foreground the South African policy framework for inclusive education and to position the <i>Policy on Screening, Identification, Assessment and Support</i> within this framework	Document analysis
To explore the experiences in mainstream schools regarding the implementation of the <i>Policy on Screening, Identification, Assessment and Support</i>	Focus group interviews and semi-structured individual interviews

1.5.2.1 Literature review

A literature review is seen as the critical and analytical evaluation of work that has been published by researchers and other accredited scholars on a specific topic. The aim of a literature review is to gain some understanding of various perspectives on a research

topic, but also to assist a researcher to clarify how his or her work can fill a void in scholarly research (Randolph, 2009; Fink, 2014). Given the close relationship between methodology and methods (*cf.* 1.5.2), it can be accepted that methodology influences the purpose of a literature review. When conducting qualitative research, the purpose of a literature review is to provide an outline of the research problem in an inductive manner (Paré, Trudel, Jaana & Kitsiou, 2015). A literature review subsequently assists with the substantiation of a research problem and the subsequent investigation of a problem, albeit in the absence of the views of any participants (Ridley, 2012; Creswell, 2012). However, there are also disadvantages associated with a literature review. The reading and evaluation of academic material for its usability for a study can be a complicated and time consuming activity (Chen, Wang & Lee, 2016). Also, as noted by Sutton (2016), a literature review often only includes research that validates the assumptions of the researcher, rather than considering contrary findings that may influence the outcome of the study. However, despite the few disadvantages, I perceive the review of literature important for my study. Although not regarded as a data generation method, consulting literature was important in order to gain insight into how inclusive education is internationally conceptualised and nationally contextualised (*cf.* 1.3.1).

In my undertaking of a literature review, I consulted both primary and secondary sources on inclusive education. Primary sources consist of first-hand information closest to the object of the study and include official reports released by international and national organisations (Sutton, 2016). I therefore consulted government publications and published books and journals on inclusive education. When original information found in primary sources are modified by other researchers, such sources are considered as secondary (VanderMey, Meyer, Van Rys & Sebranek, 2014; Galvan, 2013). By implication, secondary sources generalise, analyse, interpret and/or evaluate original information. Even though primary and secondary sources can be used in research, new knowledge emerges from analysing primary sources and therefore it was more desirable for me to review primary sources to ensure an original account of information (*cf.* Cronin, Ryan & Coughlan, 2008). While the review of literature enabled me to gain insight into how inclusive education is conceptualised, both on an international and national level, it also assisted me in interpreting the relevant literature by making it applicable to my study (*cf.* Hart, 2018; Aveyard, 2010). In addition, the literature review helped me to collaborate my research findings and subsequently assisted in reducing the potential for bias to occur within the study (*cf.* Bowen, 2009).

1.5.2.2 Document analysis

Analysing documents is described by Bowen (2009) as a systematic procedure used when reviewing electronic and/or printed documents applicable to one's research. Doing a document analysis calls for data to be examined and interpreted with the aim to gain a better understanding and expand one's knowledge of specific content (Corbin & Strauss, 2008; Bowen, 2009). Bowen (2009: 33) highlights the importance of knowing that data gathered from documents are not "necessarily precise, accurate or complete recordings of events that have occurred". Rather, analysing documents is individualistic in nature and can easily be seen as being too subjective as the researcher is the only one who engages with the document(s) (Wellington, 2015). However, as noted by Yanow (2007), even though one's choice of documents can be subjective, it still provides a study with background information before designing a research project or conducting interviews.

According to O'Leary (2014) there are three primary types of documents that can be used in a document analysis, namely public records, personal documents and physical evidence. Proof of organisational activities include annual reports, strategic plans, mission statements and policy manuals, and are considered to be public records. On the other hand incident reports, journals and newspaper articles are considered personal documents as they give personal accounts of individuals' actions. Physical objects, also called artifacts, found within a study setting are referred to as physical evidence and include agendas, handbooks and handbooks (O'Leary, 2014).

In order to foreground the South African policy framework for inclusive education (*cf.* 1.3.2) and to position the *SIAS* policy within this framework, I perused legislative documents which are considered public records (*cf.* O'Leary, 2014). These documents included the *Constitution of the Republic of South Africa* (1996), the *National Education Policy Act* (1996), the *South African Schools Act* (1996), *White Paper 6* (2001), and the *SIAS* policy (2014). It was necessary to analyse these documents specifically as it enabled me to broaden my understanding of the *SIAS* policy and the ways in which it is positioned within the South African policy framework regarding inclusive education. In addition, I prefer to analyse primary sources which provide original accounts of information, such as the *White Paper 6* and the *SIAS* policy (*cf.* Cronin *et al.*, 2008). The advantage of a document analysis for this study was twofold: it provided me with the insight necessary for developing the interview schedules used during the focus group discussions and semi-

structured interviews, and it also provided support for my interpretation of the generated data within the broader policy framework (*cf.* Yanow, 2007).

1.5.2.3 Focus group interviews

Focus group interviews take place in a social context where a group of individuals are gathered together to discuss a particular topic, based on the question that they are asked (Paloniemi, Apostolopoulou, Primmer, Grodzinska-Jurcak, Henle, Ring & Simila, 2012; Bennett, Roth, Klain, Chan, Christie, Clark & Wyborn, 2017). Focus group interviews usually consist of a small group of participants who have something in common with one another (Rannay, Meisel, Choo, Garro, Sasson & Guthrie, 2015). The purpose of a focus group interview is to obtain good quality data from interviewees that are relevant to one's study as it is centred on gathering evidence that helps to achieve the objectives of one's research (Cohen, Manion & Morrison, 2011). Focus group interviews can serve as a rich source of information as the researcher is able to obtain information based on insider insights and experiences. Dilshad and Latif (2013) note that one of the disadvantages of focus group interviews is that some participants might conform to the responses of others, even if they do not agree, which can influence the researcher's findings. This can be ascribed to the fact that a focus group does not gather in a natural social atmosphere, but the participants are probed in order to gather in-depth and detailed information (Mishra, 2016). When some participants conform to the responses of others, it is difficult for a researcher to provide reliable results when analysing the data. Another limitation of focus group interviews is that it is sometimes difficult to get all the participants together simultaneously (Dilshad & Latif, 2013).

In order to explore the experiences in mainstream schools with the implementation of the *SIAS* policy (*cf.* 1.3), focus group interviews were conducted with members of the School-Based Support Teams (SBST) of three mainstream primary schools (*cf.* 1.5.3). The SBSTs at schools, which consist of a representative of the school management team (SMT), representatives from each grade or phase, the school-based support team coordinator and a learning support teacher, must "respond to teachers' request for assistance with support plans for learners experiencing barriers to learning" (RSA DBE, 2014: Section 11). Because Section 11 of the *SIAS* policy indicates that the SBST is responsible for assisting personnel in supporting learners who experience barriers to learning, I chose to use them as participants in my focus group interviews.

1.5.2.4 Semi-structured individual interviews

In qualitative research, interviews are commonly used as an instrument to gather focused qualitative, textual data (Inghilleri, 2013). Moore (2014) explains that an interview is a conversation between the interviewer and the participants where the interviewer asks certain questions that relate to a specific topic. Kvale and Brinkmann (2009) explain that the success of an interview is dependent on the interviewee's experience and knowledge of the topic under review, and also the extent to which the interviewer is prepared for an interview. Within the context of qualitative research, a distinction is made between different types of interviews, namely unstructured, structured and semi-structured interviews (Jamshed, 2014). According to Creswell (2012), an unstructured interview can progress as a normal conversation but due to its unstructured nature, no or very few specific questions are posed to the interviewee. The disadvantage of an unstructured interview is that it does not always remain focused on a specific topic, and the data gathered in this manner might be insufficient to realise a specific research objective. Unlike unstructured interviews, structured interviews strictly adhere to an interview protocol that consists of predetermined questions which are asked in a specific order. Given the strict adherence to specific questions, the interviewee does not probe a participant for further explanations and elaborations, which, in turn, makes it difficult to generate information-rich data. In semi-structured interviews, the interview protocol used to guide the interview process gives the interviewee the opportunity to probe for additional information, and/or to adjust questions throughout the interview (Creswell, 2012; McLeod, 2014). In this manner, semi-structured interviews are perceived as most appropriate to generate information-rich data from research participants.

Making use of semi-structured interviews was suitable for this study, as it allowed me to better comprehend the lived experiences of the participants of my study (*cf.* Seidman, 2013). The vice-principals from the three participating schools were interviewed after the focus group discussions which were held with the SBST members. Principals were regarded as most appropriate for semi-structured interviews as they are responsible for ensuring that the SBST is functional and supported (*cf.* RSA DBE, 2014). But, as none of the Principals were available to be interviewed, the vice-principals participated in the study. Semi-structured interviews also allowed for the modification of questions when needed. Making use of interviews, gave me the opportunity to probe for deeper meanings in order to explore their experiences with policy implementation (*cf.* McLeod, 2014). Combining focus group interviews with individual interviews provided me with empirical

data that created a better overall picture of the research topic, which in this case was the experiences in mainstream schools when implementing the *SIAS* policy (*cf.* Namey, Taylor, Eley & McKenna, 2017).

1.5.3 Participant selection

A non-probability sampling method is used when researchers use their own judgement to select the participants who have knowledge of the research topic and could therefore contribute towards the generation of in-depth data (Saunders, Lewis and Thornhill, 2012; Creswell & Plano Clark, 2011). In this study, my participant selection was informed by focusing on individuals that were knowledgeable about the *SIAS* policy and its implementation. I used a variety of criteria to select research participants and schools for my field work.

I decided to work with SBST members because they are, according to the *SIAS* policy, responsible for “[c]oordinating all learner, teacher, curriculum and school development support in the school” (RSA DBE, 2014: Section 26(7)(a)). In addition, members of the SBSTs are also responsible for responding to requests from teachers for assistance in order to support learners who experience barriers to learning (RSA DBE, 2014). I regard SBST members as most knowledgeable about the policy and my contention is that they are best positioned to provide in-depth data regarding their experiences with the implementation of the policy. I also decided to work with school principals based on their responsibility to ensure that the SBST is functional and supported (*cf.* RSA DBE, 2014). However, I decided to select participants from primary schools because *The European Agency for Special Needs and Inclusive Education* (2013) emphasises the importance of early identification and support provision for learners who experience barriers to learning in order to ensure the implementation of effective inclusive education. I selected three primary schools at which I conducted focus group interviews with the SBST members, and I also interviewed the vice-principals of the schools as they are usually the head of the SBST. I kept the different quintile levels of schools as a selection criterion in mind. According to the *South African School Guide* (n.d.: Online), South Africa schools are classified into five quintile levels based on the financial contributions parents can make towards school fees. Quintile 1 to 3 schools receive the most funding per learner compared to learners in quintile 4 to 5 schools, where parents are in a position to contribute towards school fees. It was necessary to work with schools from different quintile levels as the differential school contexts provided different experiences regarding

the implementation of the S/AS policy. I selected a quintile 3, quintile 4 and quintile 5 school in the Motheo district of Bloemfontein. The decision to work with Bloemfontein schools was based on convenience as I reside in Bloemfontein. Working with schools in this area was cost effective and less time-consuming, as I did not have to travel far for the focus group interviews and individual interviews (*cf.* Saunders, Lewis & Thornhill, 2012).

1.5.4 Data analysis

According to Merriam (2009), the objective when analysing data is to make sense of information at your disposal by consolidating, decreasing and interpreting it. According to Nieuwenhuis (2016), qualitative data analysis is a continuous process which involves gathering, processing and analysing data, and then reporting the results of one's findings. Empirical data was gathered by audio-recording focus group interviews with members of the SBSTs and individual interviews with the principals of the participating SBSTs, and keeping a reflective journal. In order to analyse the empirical data from my interviews, I made use of thematic analysis. Analysing data implies that data should be consolidated, categorised, classified and interpreted (Merriam, 2009). Data was consolidated by first transcribing the audio-recordings from the interviews. Transcribing the data enabled me to identify specific recurring themes and categorising similar themes together. Different codes were assigned to the different schools and its participants. Each of the three schools were be assigned a letter A – C, and referred to as Group A, B and C. The interviewees from each of the groups were then be numbered and referred to as A1, B1, and C1 etc. The coding enabled me to organise and analyse the data and report on the findings (*cf.* Merriam, 2009).

1.6 TRUSTWORTHINESS OF THE STUDY

Trustworthiness is considered as the truth value and the transparency of conduct throughout a study (Cope, 2014). Lincoln and Guba's criteria to ensure the trustworthiness of findings as set out in 1985 (as cited in Anney, 2014), were used to guide this study, namely credibility, transferability, dependability and confirmability. In the following exposition I indicate the steps I took to protect the integrity of my findings.

To promote trustworthiness, the *credibility* of my study was foregrounded. Merriam (in Anney, 2014) refers to credibility as the degree to which the findings of one's study is congruent with reality. *Credibility* therefore refers to the amount of truth present in a study and its findings, as determined by the reader, based on the support or evidence provided

throughout the study (Polit & Beck, 2014). In my study I ensured credibility by making use of procedures such as peer debriefing and member checks (*cf.* Anney, 2014; Yazan, 2015). Researchers are expected to seek support and scholarly guidance from other professionals. This means that the researcher provides his/her academic work to peers in order to provide feedback and comments to the researcher in order to help develop the conclusion of the research (Anney, 2014). Member checking is when participants of the study are presented with the results of the empirical data, in order for them to determine whether or not it accurately represents their experiences (*cf.* Birt, Scott, Cavers, Campbell & Walters, 2016). The aim of member checking is to evaluate the ways in which the data was analysed and interpreted against the documents that were analysed when collecting the data (Birt *et al.*, 2016).

According to Bowen (2009), credibility cannot be ensured without *dependability*. In order for a study to be dependable, the research process needs to be clearly documented and logical (Lorelli, Nowell, Norris, White & Moules, 2017). Bowen (2009) states that one of the most effective ways to gain dependability is for the researcher to create an audit trail which shows how data was collected, recorded and analysed. Providing participants with a description of techniques and sources used to collect and analyse data when conducting focus group interviews and semi-structured individual interviews, is aimed to demonstrate the truthfulness of one's findings (O'Brien, Harris, Beckman, Reed & Cook, 2014). If evidence of an audit trail is present in a study, readers will be able to make their own judgement about the value of the study (O'Brien, *et al.*, 2014). Another criterion that must be considered when aiming to ensure that a study is trustworthy, is *confirmability*. Confirmability is the extent to which the research findings are consistent and repeatable at any other point in time (Polit & Beck, 2014). Bowen (2009) states that one's findings will be consistent and repeatable if an audit trail is created and a reflexive journal is kept. An audit trail "offers visible evidence - from process and product - that the researcher did not simply find what he or she set out to find" (Bowen, 2009: 307). In order to ensure confirmability there has to be a visible trail of evidence of the different processes used to reach the objectives of my study (*cf.* 1.3.). A reflexive journal is a document that reflects, interprets and plans ways in which data is collected. It includes all events that happened in the field and it can contribute to maintaining consistency throughout the study (Lindroth, 2014).

Research findings need to be *transferable*. Transferability is the degree to which one's research findings are applicable in theory, practice and/or future research in other

contexts. It further enables other researchers to understand the multiple perspectives that define it (Denzin & Lincoln, 2011). According to Cohen *et al.* (2011), the transferability of inquiry is facilitated when a detailed description of enquiry and participant selection is provided by the researcher. To secure transferability within my study, I provided a description of my research design (*cf.* 1.5), and indicated how the research participants were purposively selected for their knowledge of the implementation of the *SIAS* policy (*cf.* 1.5.3.).

1.7 ETHICAL CONSIDERATIONS

Ongong'a and Akaranga (2013) explain ethical considerations as the norms for conduct that distinguish between acceptable and unacceptable behaviour by the researcher during the research process. In order to secure ethical soundness, the main objective of research ethics was to protect the participants of the study from physical and emotional harm by putting certain measures in place (Beckmann, 2017). An important measure was to require written informed consent from participants prior to participating in a study. I sought and obtained written consent from the participants for participating in the focus group interviews and individual interviews after I explained the aim and process of the study, including any potential risks involved in their participation (*cf.* Grady, 2010). The participants were informed that their participation in the study was voluntary, and that they were able to withdraw at any stage of the research process. In addition, they were assured that the information they provided during the focus group interviews and individual interviews would be treated as confidential, and that I would protect their identities through the use of pseudonyms (*cf.* Connaway & Powell, 2010). It was also important to inform the participants that the focus group discussions and interviews would be audio-recorded, transcribed by myself and stored on a password-protected computer. As this study dealt with human participants, it was important to recognise, acknowledge and affirm their dignity by making them feel recognised, seen, understood and heard throughout the research process (*cf.* Hicks, 2011). To minimise the risk of intimidation and to create a comfortable atmosphere, the focus group interviews and individual interviews were done at the schools of the research participants. Before starting with my field work, I conducted a literature review to help me to focus my research and to connect the research topic to other studies which relate to similar research (*cf.* Jesson, Matheson & Lacey, 2011).

I applied for ethical clearance from the University of the Free State's ethics committee. As my study involves working with employees of the Department of Basic Education, I also

needed permission from the department. I was granted ethical clearance from the ethical committee of the University of the Free State (*cf.* Appendix A, UFS-HSD2019/0479) and permission from the Free State's Department of Basic Education (see Appendix B) to conduct this study.

1.8 DEMARCATION OF THE STUDY

The demarcation of a study is when an area of interest within the research context is isolated by the researcher in order for it to become manageable with the intention of achieving the research objectives (Verschuren & Doorewaard, 2010). In order to demarcate my study to Policy Studies in Education, I present an argument in favour of this field of investigation in the subsequent section. I also present a geographical demarcation in order to clarify from the onset where the participating schools and participants in this study are located.

1.8.1 Scientific demarcation

Policy is described by Dumas and Anderson (2014) as a course of purposive action that an organisation has in place for dealing with a specific area of concern. They (Dumas & Anderson, 2014) further explain that a policy focuses on what is done in an organisation, rather than on the intention of the policy. In this sense, policy is viewed as a practice that unfolds over time. An education policy can equally be considered as a course of action, but the emphasis is specifically placed on actions within an education system (Dalton, Mckenzie & Kahonde, 2012). Public authorities are responsible for creating education policies. These policies are informed by specific values and ideas which are directed at education stakeholders and is expected to be executed by administrators and education professionals (Rayou & Van Zanten, 2015). Given this understanding of education policy, policy studies in education can be perceived as the analysis of specific education policy within its institutional, national and global context(s) (Rayou & Van Zanten, 2015). Analysing policies is a key approach in educational policy studies, and is often done to understand the intentions of a specific policy and/or its effect after implementation (Taskoh, 2014).

In my study I engage with official policy documents pertaining to inclusive education in South Africa. More specifically, I analyse documents to foreground the policy framework for inclusive education, and through my analysis I position the *SIAS* policy within this framework (*cf.* 1.5.2.2). The analysis of the *SIAS* policy is significant within the context of

my study – in order to explore the experiences of mainstream schools with policy implementation, the policy must first be analysed. This study can therefore be demarcated to Education Policy Studies.

1.8.2 Geographical demarcation

In the Free State province there are five districts, namely Xhariep, Lejweleputswa, Fezile Dabi, Thabo Mofutsanyana and Motheo (see Figure 1.1). The city of Bloemfontein, which is situated in the Motheo district, was identified as the demarcated area for my study. I will conduct focus group discussions and interviews with members of the SBSTs of three primary schools in the Bloemfontein area, ranging from quintile 3 to quintile 5 (*cf.* 1.5.3).

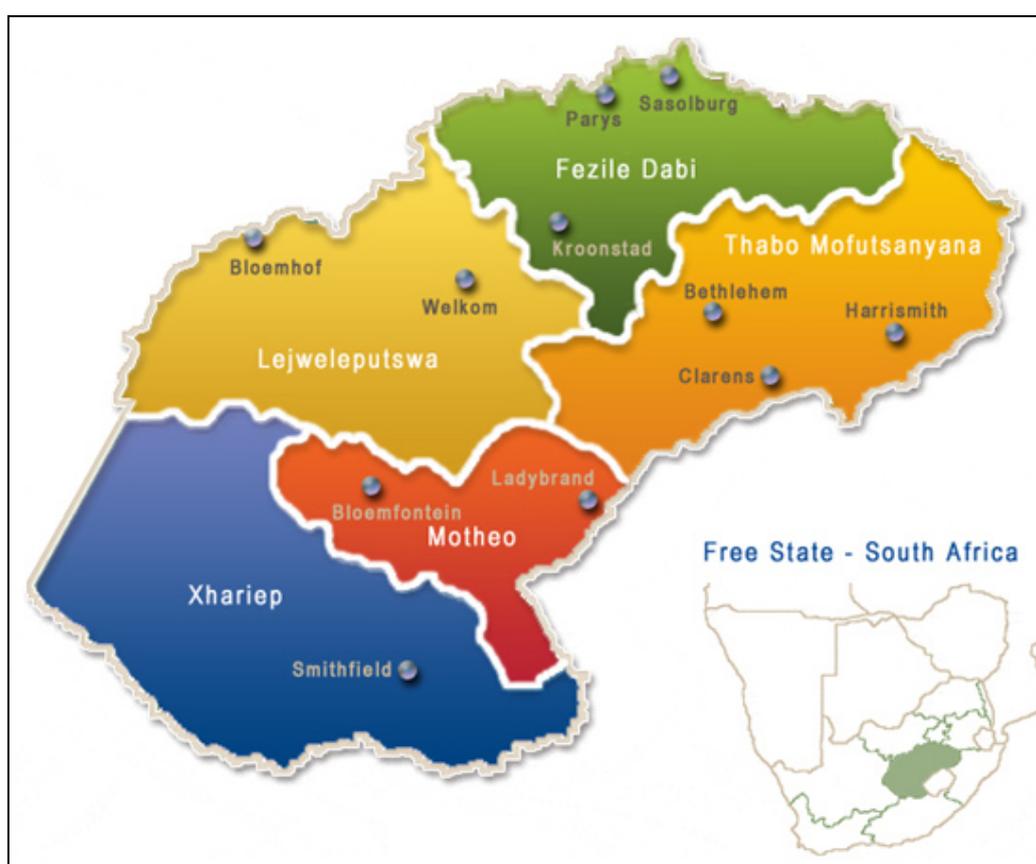


Figure 1.1: Location of Bloemfontein within the Free State Province (source: infosa.co.za)

1.9 OUTLINE OF THE STUDY

In Chapter 2, a literature review will inform a conceptualisation of inclusive education. In drawing on a variety of sources, I will conceptualise an understanding of inclusive education on an international level, and contextualise the concept on a national level (*cf.* 1.3.3). The information gathered in this chapter will guide the search for applicable documents to analyse in Chapter 3.

Chapter 3 presents the analysis of the policy framework that constitutes inclusive education within the South African context. Analysing official documents pertaining to inclusive education will enable me to position the *SIAS* policy within the South African inclusive education policy framework (*cf.* 1.3.2). Conducting a document analysis will enable me to construct questions for the focus group discussions and interviews, which will help me to obtain data relevant to the research topic.

Chapter 4 will present and discuss the empirical data generated from the focus group discussions and interviews. The objective of this chapter is to explore the experiences of mainstream schools with the implementation of the *SIAS* policy (*cf.* 1.3.3). The literature review in Chapter 2 will provide me with background information on inclusive education, while the document analysis in Chapter 3 will inform the analysis of the generated data from the interviewees as well as the presentation of my research findings.

Chapter 5 is a reflection of the entire study and answers the research question through the presentation of comments on and implications of the experiences in mainstream schools with the implementation of the *SIAS* policy.

1.10 SUMMARY

In Chapter 1 I provided a basic orientation to my study. Against the backdrop of the enactment of the *SIAS* policy, I presented the primary research question which guided the study, together with sub-questions that enabled a gradual approach towards answering my research question. The study is couched in an interpretivist paradigm, which in turn also informed the qualitative methodology of my study and the subsequent research methods, namely document analysis, focus group discussions and semi-structured interviews. In this chapter I also indicated the steps taken to ensure the integrity of the study, together with the ethical considerations that had to be taken into account throughout the research process. A clear scientific and geographical demarcation of the study is included in this chapter. In the next chapter I conduct a literature review with the aim to conceptualise inclusive education in general, and I then position inclusive education within the South African context.

CHAPTER 2: CONCEPTUALISATION AND CONTEXTUALISATION OF INCLUSIVE EDUCATION

2.1 INTRODUCTION

The *World Report on Disability* (2011) indicates that over 1 billion people (15% of the world population) have some kind of disability, and that 80% of these people are from developing countries. Even though there was a significant decrease in this number over the last few years, there are still more than 50% of the 65 million children from developing countries who have disabilities who do not attend school (Male & Wodon, 2017). Barriers to learning that children with disabilities might experience include inaccessible schools, unavailability of teaching materials, discrimination from teachers, and bullying from their peers. These barriers to learning are problematic as children with disabilities already encounter low levels of enrolment and attainment in schools. Low levels of learner enrollment and attainment lead to a lack in literacy and contribute towards expanding the gap between those learners with disabilities and those without (Das, Kuyini & Desai, 2013). Such gaps lead to the exclusion of learners with disabilities. In order to establish ways in which learners with special educational needs and/or disabilities can be included in the education system, international and national inclusive education policies and practices need to be researched (Farrell, 2010; Slee, 2011). The aim of Chapter 2 is therefore to explore international inclusive education policies and practices as a backdrop to contextualise inclusive education in the South African context (*cf.* 1.5.2.1).

International and local inclusive education policies and practices, together with the treaties that influence it, are discussed in this chapter in order to conceptualise inclusive education on an international and national scale. I first provide a global perspective on disability together with the influence of international treaties on inclusion. Different models of disabilities are discussed in order to better understand inclusive practices on both an international as well as a national level. This is done by presenting case studies regarding inclusive practices from Finland, Italy, Zimbabwe and Lesotho. The chapter is concluded with a brief exposition of inclusive education in South Africa.

2.2 A GLOBAL PERSPECTIVE ON DISABILITY

Between 2006 and 2014, 158 of the United Nations' member states adopted the UNCRPD (Iriarte, McConkey & Gilligan, 2016). According to the Preamble of the UNCRPD, its purpose is to

promote, protect and ensure the full and equal enjoyment of all human rights and fundamental freedoms by all persons with disabilities, and to promote respect for their inherent dignity (UNCRPD, 2006: 1).

By implication, the UN is in the position to hold the member states accountable for including or excluding members of society who live with a disability (Mariga, McConkey & Myezwa, 2014). The ratification of the UNCRPD means that these member states undertook a commitment in international law to convert the principles of the UNCRPD into national policy and practice (Iriarte *et al.*, 2016). By agreeing to the UNCRPD, all of the signatories acknowledged that disability is a human rights issue, which implies that any person with a disability is protected by anti-discrimination legislation (Iriarte *et al.*, 2016).

A definition of what is considered to be a disability had to be established by the UNCRPD in order for legislation and policies to be ratified within any country (Iriarte *et al.*, 2016).

Article 1 of the UNCRPD (2006) defines people with disabilities as those

[w]ho have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others.

This definition was later rejected. It was contended that such a conclusive definition has the potential to exclude people with other impairments (than those mentioned), that may cause them to experience barriers that hinder effective participation in society (Schulze, 2010). By implication, and since different definitions of disabilities exist within countries, the lack of a unified definition of disability means that the concept can be defined differentially through national legislation (Giddens & Sutton, 2013). In a similar vein, Grech (2012: 58) explains that "contexts and circumstances vary and are not static, so the meaning of disability is fluid, dynamic and shifting, constantly (re)negotiated". National legislation on disability can subsequently differ from context to context. Even though the UNCRPD's definition of disability was rejected, the constitutive components thereof were used for an enhanced understanding of disability. Concepts like impairment, interaction with barriers, participation in society and equality were found to be useful in the creation of disability models (Iriarte *et al.*, 2016: 12). Disability models are representations of concepts which identify and categorise disabilities according to their similarities (Goodley, Hughes &

Davis, 2012). Models of understanding disability are adopted in local contexts to reflect its own culture and to facilitate the application of national legislation and policy in order to promote the inclusion of those with disabilities in society (Grech, 2012).

For the sake of a more comprehensive understanding of how disability is conceptualised, I refer in short to some models of disability. Conceptual models of disability are related to society's idea(s) of what disability and/or impairment(s) mean. The *individual model of disability* perceives disability as challenges that arise because of cognitive and/or physical impairments located in the individual (Iriarte *et al.*, 2016). Disability is therefore associated with any secondary problems that disabled individuals might experience, such as a poorer quality of life (Giddens & Sutton, 2013). According to the WHO (2011), problems experienced as a result of disability can be addressed by curing, correcting or rehabilitating the disability, and also by the assistance of professionals.

Unlike the individual model, the *social model of disability* accepts that society is the main cause of challenges associated with disability (Iriarte *et al.*, 2016). This model suggests that the environment and social establishments ill-treat those who suffer from disabilities. In this context, the idea of disability is subsequently socially constructed (Shakespeare, 2010). However, the *social model of disability* changed society's perception(s) of those with disabilities from being victims of their circumstances to being potentially active citizens of society (Shakespeare, 2010). The *social model of disability* is embraced by disability organisations and governments around the world who recognise the role of society in improving the lives of those living with disability (Bickenbach, 2009). Goodley *et al.* (2012) insist that the *social model of disability* has an extensive impact on inclusion.

2.3 INTERNATIONAL TREATIES AND INCLUSION

Various international treaties have played and are still playing a crucial part in enhancing the inclusion of those with disabilities in society. In this section I unpack a number of these treaties. I understand that a treaty is an agreement between sovereign states and international organisations that assume certain obligations amongst themselves, and if the agreed upon obligations are not met, these states and organisations are held liable under international law (Druzin, 2014). Within the context of inclusive education, international treaties subsequently influence and compel signatory states to base their local inclusive education policies, albeit within their specific contexts, on the clarified obligations they have signed up for. Although the UNCRPD of 2006 is perceived as the most significant

treaty in terms of inclusive education, I consider it important to unpack and highlight the trajectory of treaties that led to the development of the UNCRPD (*cf.* Waddington & Toepke, 2014). As such, I refer in the subsequent section to *Education for All* (1990), the *Salamanca Statement* (1994) as well as the *Dakar Framework for Action, Education for All* (2000).

In 1990, the *World Conference on Education for All* (EFA) called for a commitment from UNESCO, UNICEF, the *United Nations Development Program* (UNDP) and the World Bank's commitment to help promote equity in education for those with disabilities throughout the world (Muthukrishna, Morojele, Naidoo & D'Amant, 2016). Various international governments committed themselves to the aims and principles of the *Salamanca Statement* (1994), the *Dakar Framework for Action, Education for All* (2000) as well as the UNCRPD (2006) in order to promote equity in education (Muthukrishna *et al.*, 2016). These conventions and treaties have played a vital role in shaping inclusive education as they focus on providing education opportunities for learners who have diverse learning needs and those with disabilities (Anthony, 2011, Kalyanpur, 2011; Muthukrishna *et al.*, 2016). Most of the developing countries in the Global South have ratified these international policy conventions and treaties in order to introduce their principles into local policy frameworks. More recently, however, concerns have been aired about the danger(s) of trying to uncritically reproduce the inclusive education implementation strategies of the Western world globally. Mainstreaming all learners regardless of their disability to attain inclusion in all international contexts might be problematic, as this might not be aligned with local priorities and/or demands (Richard, 2014; Mitchell, 2017). In order for inclusive education policies and practices to be implementable and sustainable in developing countries, they need to be context appropriate (Maudsley, 2014).

The *Salamanca Statement* of 1994 focused on children with special needs and articulated a commitment towards reaffirming the right of every individual to education as embodied in the *Universal Declaration of Human Rights* of 1948. This declaration is an extension of the pledge created by the world community at the *World Conference on Education for All* in 1990 in order to protect the rights of each individual regardless of their differences (UNESCO, 1994). The goals of this statement were to ensure that all children have the right to education, and to ensure that all education services take into account that children have different abilities, interests and learning needs. In order to achieve inclusion,

individuals who have special educational needs must be accepted into mainstream education settings. The contention was that an inclusive atmosphere in mainstream schools is the best way to counter discriminatory attitudes. The 300 representatives from nine participating governments and 25 international organisations who entered into an agreement with the *Salamanca Statement*, were required to prioritise making education systems inclusive, secure the principles of inclusive education in policy or law, ensure sufficient teacher education programs and invest in early childhood identification and intervention strategies (UNESCO, 1994). These goals re-establish the purpose of the 1990 *World Declaration on Education for All* conference, which provided guidelines to governments, international organisations and teachers to assist in creating and implementing policies and strategies towards improved education services. The primary goal was for every person, irrespective of his or her age, to have access to educational opportunities that meet their individual learning needs (UNESCO, 1990).

In 2000, at the *World Education Forum* in Senegal, the *Dakar Framework for Action, Education for All* (EFA) was promoted by UNESCO with the intention of meeting the learning needs of children and adults around the world. This global movement set out six common goals in the year 2000 that were to be met by 2015 in accordance with the *Millennium Goals* (Lomazzi, Borisch & Laaser, 2014). These goals focused on expanding early childhood care and providing free, compulsory primary education to all, and promoting learning and life skills for the youth and adults. Other goals included increasing adult literacy by at least 50%, achieving gender parity by 2005, gender equality by 2015, and improving the overall quality of education (UNESCO, 2010). A total of 164 governments accepted the framework and committed themselves to achieve the millennium goals through the provision of basic education to all children and adults, irrespective of their culture, religion or disability. Improving quality education was not only highlighted as one of the main priorities of EFA (2000), but it was also seen as a key component to help achieve the *Millennium Goals* (2000) by 2015. However, in order for inclusive education to become a reality, policy-makers were required to rethink the quality of support provided for those experiencing learning barriers (Dalton *et al.*, 2012).

In 2006, the UNCRPD reaffirmed its mission to improve the quality of education worldwide by stating its aim to be

to promote, protect and ensure full and equal enjoyment of all human rights and fundamental freedoms by all persons with disabilities, and to promote respect for their dignity (UNCRPD, 2006: Article 1).

The adoption of the CRPD by the United Nations in 2006 was paramount to the transformation of inclusive education systems and policies around the world (Iriarte *et al.*, 2016). As education was highlighted in the UNCRPD as one of the most significant human rights, it can be accepted that inclusion forms part of this right (*cf.* Muthukrishna *et al.*, 2016). Article 24(1) of the UNCRPD (2006) affirms that the signatories

recognize the right of persons with disabilities to education. With a view to realizing his right without discrimination and on the basis of equal opportunity, State Parties shall ensure an inclusive education system at all levels and lifelong learning.

The UNCRPD subsequently called for governments and members of professional organisations to reconsider their inclusion policies and practices, and by doing so, these policies provide an opportunity for the more than 1 billion people worldwide who live with a disability to have a better quality of life (Mittler, 2012).

Studies done in the Global South indicate that children living with disabilities still face obstacles and exclusionary pressures when wanting to access quality education (Moyi, 2012). Despite the fact that rights-based legislation and policies exist in numerous countries in the Global South, parents of children with disabilities often have a limited amount of knowledge on what their children's rights are and how to access relevant support services (Muthukrishna & Ebrahim, 2014). Support services like assistive technology can contribute to the quality of education, and transport to and from schools can ensure accessibility, but this is usually very limited in poorer countries (Hayden, 2013). A lack of qualified teachers, inflexible curricula and inaccessible buildings for those with physical disabilities limit the educational opportunities for learners with disabilities (Singal, 2011). The state of affairs is often exacerbated by low expectations and negative attitudes regarding the ability of children with disabilities to participate in teaching and learning environments. Slee (2011) notes that in order to develop inclusive schools, whole-school re-organisation needs to take place. It has been found that in most Sub-Saharan countries, inclusive education is legislated, but not carefully planned for, leading to a lack of or poor policy implementation (Mitchell, 2017).

2.4 DIFFERENT APPROACHES TO INCLUSION

The process of adapting educational policies which advance the inclusion of learners with disabilities into mainstream education settings, began to gain momentum after the *Warnock Report* was released in 1978 (Greenstein, 2015). While special educational settings segregate learners with disabilities and impairments, and increase the risk of learners being labeled and socially excluded, the incompatibility of inclusive education policies with the realities of mainstream schooling is also often criticised (Goodley & Runswick-Cole, 2011; Greenstein, 2015). In 2005, Baroness Warnock insisted that the original ideals for inclusive education, as set out in the *Warnock Report*, must be reconsidered, as its efficiency has been overestimated (Greenstein, 2015). As a consequence, various theories of disability and inclusive education emerged, holding significant implications for mainstream and special education policies and practices (Goodley & Runswick-Cole, 2011; also Artiles, Kozleski & Waitroller, 2011; Singal & Muthukrishna, 2014).

For the most part of the 20th century, providing segregated, special education for children with disabilities was considered the norm as it enabled students to learn alongside their peers. There was a general belief that different approaches to education needed to be implemented in order to accommodate the different types of learners found within society (Armstrong, Armstrong & Spandagou, 2011). This view was grounded in the *medical model of disability* which attributes differences among learners with disabilities to individual pathologies (Thomas & Loxley, 2013). The *medical model of disability* considers disability to be “a personal tragedy for both the individual and her family, something to be prevented and, if possible, cured” (Carlson, 2010: 5). This approach supports the idea that those with disabilities cannot be compared to or treated the same as their peers who are able bodied (Johnstone, 2012). This model also categorises able bodied individuals as superior in comparison to those who have disabilities and a medical diagnosis. This act of categorizing is based on standardised criteria, and is subsequently required to place learners in a special school where they can get support for their specific educational needs (Carlson, 2010 and Thomas & Loxley, 2013).

However, inclusive education is mainly considered to be a multi-dimensional idea in that it celebrates and values differences along with diversity, and more often than not, it coincides with the *social model of disability* (Slee, 2011; Topping, 2012). According to Salend and Wittaker (2012), most inclusive education theories are based on the social

model of disability. The *social model of disability* challenges the *medical model of disability* by affirming that

a person's impairment is not the cause of disability, but rather disability is the result of the way society is organised, which disadvantages and excludes people with impairments (Armstrong *et al.*, 2011: p. 30).

The *social model of disability* further proposes that inclusive education is only possible if learners with disabilities are able to access a flexible curriculum, along with teachers who are capable of responding to individual learners' strengths and shortcomings. Salend and Wittaker (2012) also suggest that instruction be differentiated, and that reflective practices occur in order to establish collaboration between learners, their families and their teachers. Practices associated with inclusive education are often seen as unrealistic because inclusion is context specific. Consequently, both the meaning and the implementation strategies of inclusive education will vary from country to country (Armstrong *et al.*, 2011).

A theory, called the *theory of full inclusion*, suggests that children, irrespective of their disabilities and/or special educational needs, must be able to be accommodated in mainstream schools along with their peers (Hansen, 2012). Full inclusion has been widely criticized, as its objectives are considered to be impossible to achieve in practice (Kauffman & Badar, 2014). The *theory of inclusive special education* emerged as an embodiment of the critique against the idea of full inclusion. This theory proposes that learners as well as their parents should be given a choice as to whether or not they want to make use of mainstream or specialised schooling (Hornby, 2014). This theory is primarily informed by linking special education and inclusive education. The values and philosophies of inclusive education can then be combined with specific special education strategies, such remedial education and therapy (Hornby, 2014). This theory is centered on ensuring that each child with special educational needs is successfully schooled from primary to secondary school in either special or mainstream schools, depending on which is most suitable for their individual educational needs.

In 2009 in the United Kingdom, the *Lamb Inquiry* explored the complexities of special educational needs. This report found that a vast number of learners with special educational needs who struggled in mainstream schools, found it more beneficial to be in special schools (DCSF, 2009). While the theory on inclusive special education focuses on including those with special educational needs in mainstream schools, the theory supports

the option for placement in a special school to those learners whose educational needs are not fulfilled in mainstream schools. To implement inclusive special education, research-based practices should be applied in teaching and learning environments (Mitchell, 2017). The success of this theory is therefore based on the acknowledgement of the diversity of learners, and using that knowledge to create strength-based approaches within the learning process to suit all learning needs in the classroom (Salend & Whittaker, 2012).

Irrespective of the type of inclusion model that a country chooses to follow, the ways in which inclusive practices are implemented are mainly determined by cultural, social, political and social factors (Leyser & Kirk, 2011). There are different ways in which inclusive practices are implemented, and this varies from country to country (Friend, 2011). Countries that are able to successfully implement inclusive education are usually supported by clear legislation (Frankel, Gold & Ajodhia-Andrews, 2010). In the following section I give an exposition of inclusive education practices in different countries - two in Europe and two in Africa.

2.5 INCLUSIVE EDUCATION: CASE STUDIES

Internationally, inclusive education is implemented in different ways. Many countries insist on including learners from special educational settings into mainstream schools by making use of well-resourced and established support services. Other inclusion strategies involve ensuring that learners are attending school to prevent them from being excluded from the education system (Dreyer, 2011). However, as noted by Friend (2011; Leyser & Kirk, 2011), every country has the freedom to interpret inclusion and implement its practices in different ways due to the influences of country-specific cultural, social, political and social factors. Differences in the interpretation of inclusive education and its implementation strategies are discussed in the sections that follow.

2.5.1 Finland

The first quarter rankings of 2019 of the *World Top 20 Project* indicate that Finland's education system is the best in the world. The Finnish education system was revised in the 1970s and today its legislation is mainly guided by the principles of inclusion. To provide schooling for learners with special educational needs in a mainstream context, classroom practices had to be adapted towards the promotion of educational equity (Loukomies, Petersen & Lavonen, 2018; Sahlberg, 2010). Educational equity became one

of the fundamental goals behind the changes in Finland's education system. Local curricula based on a national core curriculum were adapted at school level to secure the best possible learning opportunities for everyone (Loukomies *et al.*, 2018). In Finland, the special education system rests on the principles of the *inclusive special education theory*. This means that specialised education is provided in mainstream classrooms to those with special educational needs. In particular, this theory is centred on providing individual support for learners with special educational needs to prevent any problems from worsening (Hornby, 2014). Within the general teaching and learning process, every learner is entitled to some or other form of support if they need it. While the latter is referred to as general support, intensive support is available to learners who are in need of extra learning support. In cases where learners show little growth in development and/or learning objectives, special support is not only recommended, but also provided for over a longer period of time based on an *Individual Education Plan (IEP)* (Niemi, Toom & Kallionemi, 2012). Finnish education legislation prevents learners from being categorised based on their disabilities or support needs. Their need for support is assessed instead. Support available to learners can be minor or major, and can be temporary or continuous, depending on the individual support needs. Support measures that are available for learners who are in need of extra support include remedial instruction and part-time special needs education. Individual learning plans are created for those learners who receive intensified and special support, which include an individualised curriculum. The duration of compulsory education can also be lengthened by one year for learners who receive special support, but only if the learner feels inclined to do so (Björn, Aro, Koponen, Fuchs & Fuchs, 2015). According to Finland's *National Core Curriculum* of 2014, each learner receives support from his or her school unless the learner's support needs are not met, which will then result in a transfer to another school (Niemi *et al.*, 2012).

2.5.2 Italy

According to Anastasiou and Kauffman (2013), inclusion exists along a continuum and it is therefore unrealistic for any country in the world to apply all the principals of full inclusion. However, the authors (Anastasiou & Kauffman, 2013) acknowledge that the education system of some countries, like that of Italy, is closer to reaching inclusive education than others. Advocates of full inclusion usually pursue the dissolution of separate special education settings to ensure that all types of learners are included in mainstream schools (Warnock, 2010).

In 1971, *Italian Law 171* permitted that every child, irrespective of their disability, has the right to attend a mainstream school. At the time, children with severe disabilities still had access to specialised education at special schools (Anastasiou, Morgan, Farkas & Wiley, 2017). However, all public special schools were closed in 1977 when *Law 517* was mandated. The newly enacted national *Law 517* introduced the principle of educational integration, except in cases where the severity of impairments prevented learners to function effectively in mainstream classrooms (Madeo, 2010). To promote inclusion, the Italian government provides learners with free transport to and from school. In an attempt to support learners with physical disabilities, all architectural barriers were either removed from school buildings or modified (Troilo, 2013). However, in an attempt to promote inclusion by enforcing inclusive education, all students were forced to attend mainstream schools. This enforced inclusion was later referred to as *wild integration*. Wild integration in this context, meant that nearly 120 000 learners with disabilities and special educational needs were suddenly inserted into general classrooms. In these integrated classrooms, learners with special need were often left without any support (Anastasiou *et al.*, 2017). The Italian education system saw many changes, ranging from a complete change of lower secondary education programs in 1990 to new criteria set for learner assessment in 1995. Anastasiou *et al.* (2017) however note that even with these changes, a lack of support for learners with special needs continued and consequently led to an increase in private specialised schools for disabled learners.

Present-day Italian legislation foregrounds respect for learners' individual needs and ensure their growth and development through a framework that places the learner at the centre of education. This framework is based on *Law 104* of 1992, and according to its regulatory acts, no learner is denied access to a mainstream school. The school where an application for submission is registered, is required to make a functioning diagnosis and provide the individual with a *certification of special needs* (Sandri, 2014). A functioning diagnosis must be made by the school within 30 days upon receipt of the submission request. This diagnosis must be in line with the *Individual Education Plan*, which is a document that stipulates specific interventions needed in learning and socialisation for those with disabilities Sandri (2014). If the nature of a learner's disability is too severe and inhibits his/her participation in the mainstream setting, the IEP makes provision for the individual to become part of the *Project of life*. This project is aimed specifically at empowering those with disabilities through skills development (European Commission, 2012). However, despite all arrangements being in place to assist learners in mainstream

settings, there is still a tendency, mainly amongst parents, to seek special rehabilitation for their children with moderate disabilities and impairments, as the support they receive in public schools is considered to be insufficient (Sandri, 2014). In 2011, approximately 200 000 of the country's disabled learners and/or learners with special educational needs were enrolled in mainstream schools, with less than 1% of them in segregated settings (European Commission, 2012). Empirical data gathered by Anastasiou, Kauffman and Di Nuovo (2015) on full inclusion, however, does not indicate that inclusive settings are more socially or academically beneficial to those with special educational needs, than special placements. Access to quality education is more important than single placements for all types of learners in mainstream settings. Full inclusion is therefore often inadequate in providing support for a variety of special educational needs (Anastasiou *et al.*, 2015).

2.5.3 Zimbabwe

According to the *World Development Report* (2018) by the World Bank, Zimbabwe is ranked first on the list of top ten countries with the best education system in Africa in 2018. The ranking of countries was based on their literacy level, and Zimbabwe's literacy rate of 90.7% in 2018 means that nine out of ten Zimbabwean citizens can read and write (World Bank Group, 2018). Since Zimbabwe became independent in 1990, its education system has undergone extensive changes. These changes included its compliance with international human rights statements and conventions like the Salamanca Statement (1994) and the UNCRPD (2006). As noted by Majoko (2017), as a signatory to the UNCRPD Zimbabwe agreed on promoting inclusion in its education sector.

Inclusion in Zimbabwean education meant the removal of financial, environmental, teaching, assessment, curriculum, communication and/or socialisation barriers at all levels for learners (Majoko, 2016). The removal of financial barriers, for example, implied that learners had to attend the schools closest to them (Leyser & Kirk, 2011). Removing other barriers to learning is attempted by creating various community-based inclusivity programs supported by local and central government authorities (Mpofu & Shumba, 2012). Even though education authorities regard inclusive education as a means to promote the rights of those with disabilities, Zimbabwe has no legislation for inclusive education (Majoko, 2017). However, inclusive education is indirectly supported by legislation like the *Zimbabwe Education Act*, which was amended in 2006 to introduce free and compulsory primary education, regardless of any demographic differences in individuals (Chireshe, 2013). Because of the vulnerability of children with special needs and/or disabilities, their

rights require specified legislation, yet the *Zimbabwe Education Act* makes no specific statement about protecting the educational rights of its disabled citizens (Mapuranga, Dumba & Musodza, 2015). The *Education Act* states that “every child in Zimbabwe shall have the right to school education” (MoPSE, 4(1)). In Section 4(b) the *Education Act* states that

[n]o child in Zimbabwe shall be discriminated against by the imposition of onerous terms and conditions in regard to his admission to any school; on the grounds of his race, tribe, place of origin, national or ethnic origin, political origin, colour, creed or gender.

Although no specific reference is made to inclusive and special education, it can be assumed that the Zimbabwean government supports an education system that is inclusive, also for those learners who have special education needs.

Upon receiving support from the *Swedish International Development Agency*, formal policies were accepted by the Zimbabwean education authorities with regard to educating disabled learners and those with special educational needs alongside their peers in mainstream schools (Munikwa, 2011). The latest policy document, the *Education Circular No.7 of 2014*, renders instructions for reinforcing inclusive learning outcomes for all learners with compliance of quality service provision by the *Learner Welfare Psychological Services and Special Need Education Department* (Majoko, 2016). This policy document facilitates the mainstreaming of learners with special needs through enrolment and specialised staff provision (MoPSE, 2018). The 2017/2018 *Global Education Monitoring Report* by UNESCO, however, revealed that 67% of early childhood development teachers, together with 10% of primary school teachers, are untrained in inclusive education, which could also contribute to learning barriers. It is therefore recommended that learners with special needs undergo medical, psychological and speech pathology assessments to determine the nature and extremity of their disability, and to help identify other learning barriers that can hinder scholastic achievement (Thomas & Loxley, 2013). As stated by the *Ministry of Primary and Secondary Education* (2018), these learners attend general, mainstream classes for part of the day only. Deaf or blind learners, together with those with intellectual or severe physical disabilities, attend general classrooms for approximately 10% of the day. The other 90% of the school day is spent in specialist resource rooms, where they are taught Braille and/or sign language, for example (Thomas & Loxley, 2013). Learners with mild visual and hearing impairments and/or intellectual abilities spend 70% of their school days in general classrooms and 30% in

specialist resource rooms. Learners up to Grade 4 who have learning disabilities attend general classrooms 98% of the week, and for two hours a week they have access to intensive small group instruction (Majoko, 2017). Learners who have special educational needs attend regular, mainstream classes from Grade 5 onwards (MoPSE, 2018). Learners with disabilities can attend disability centres that are provided by non-governmental, charity organisations. Instruction mostly consists of teaching skills rather than following an academic curriculum. In contrast to government schools, these centres often have sizable budgets and superior facilities (Peresuh, 2009). Even if disability centres function separately from public schools, they offer an effective alternative to guarantee that those with disabilities are included, as opposed to being excluded from learning (Peresuh, 2009; Majoko, 2016).

2.5.4 Lesotho

In Lesotho, children must attend and pass pre-primary school for three years before moving to primary school, which accommodates the approximate age span of six to 13 years in Grades 1 - 7. Attending secondary school is not compulsory. According to statistics released by UNICEF in 2012, 73,6% of male learners and 76,4% female learners in Lesotho were enrolled in primary school. These numbers showed a significant decrease in secondary schools, as only 26,2% of male learners and 39,6% of female learners were enrolled in secondary schools (UNICEF, 2012). As claimed by the *Ministry of Education and Training* (MoET) (2018), secondary schools consist of a lower and upper secondary division. Lower secondary divisions run from Grade 8 to 10, and at completion of Grade 10 learners receive a junior certificate. Upon attaining this junior certificate, learners can then move to the upper secondary division that includes Grade 11 and 12. In the last quarter of Grade 12, a nation-wide *Junior Certificate Examination* is administered, and if successful, candidates can gain access to a tertiary education. Lesotho's education sector consists of a formal and informal domain. The formal domain accommodates pre-primary schools, primary schools and secondary schools, as well as tertiary institutions. Informal domains exist to meet the demands that learners with special educational needs require, and who are consequently not able to attend formal schools. Informal domains consist of technical and vocational schools that offer training in home sciences, automotive mechanics and bricklaying (MoET, 2018).

In Lesotho, inclusive education is seen as a tool to educate disabled learners in mainstream schools (Johnstone & Chapman, 2009). An inclusive education policy was put

in place in 1989, and the Special Education Unit of MoET selected ten pilot primary schools and provided them with inclusive education training (Mosia, 2011). These schools were used as demonstration schools that worked in conjunction with supplementary mainstream schools in order to aid them in implementing inclusive education practices. Research done by Johnstone and Chapman (2009) found that a typical lesson would require learners to complete a task(s) independently after the teacher's presentation of the lesson. Once the task was completed, the learner(s) would then present the information back to the teachers, and receive immediate feedback. In the time that learners are busy with their tasks, the teacher attends to the learners with disabilities by repeating the lesson. Within this context, teachers use their own discretion to determine how to include and accommodate those with disabilities and/or special educational needs in their classes (Johnstone & Chapman, 2009). A lack of identification and assessment policies in Lesotho means that mainstream teachers are primarily responsible for identifying and assessing learners suspected of experiencing learning barriers (Urwick & Elliott, 2010). This practice seems to be problematic as teachers tend to identify high numbers of learners as having special educational needs. Learners are then removed from classrooms and/or teachers, and receive extra resources such as classroom aides and assistants (Urwick & Elliott, 2010). It is subsequently imperative that a developing country like Lesotho must develop a professional assessment system for the identification and assessment of learning barriers. Such a system should be regulated through policy implementation (Urwick & Elliott, 2010). The reality of governance in a developing country like Lesotho is reflected in the lack of policy implementation, funding, monitoring of teachers' performance, continuous teacher training and special needs identification and support (Johnstone & Chapman, 2009; Mosia, 2011).

2.6 INCLUSIVE EDUCATION IN SOUTH AFRICA

Over the last few years, multiple countries, including South Africa, have embraced inclusion as an ideal model for education. Inclusion in this sense aims to accommodate all types of learners in mainstream schools and classrooms (Maher, 2009). While the implementation of inclusion requires a change in mainstream classroom practices, it should be noted that inclusive practices should be context specific (Srivastava, De Boer & Pijl, 2013). By implication, it can be accepted that South Africa, as is the case with other countries, should construct its own, context-bound definition of inclusive education, together with the ways in which it should be executed. According to *Inclusive Education South Africa* (2017), inclusivity acknowledges the right of all children to be included in a

supportive educational environment within their communities. In South Africa specifically, inclusive education makes reference to the capacity of public schools' ability to respond to a variety of learning needs, and to provide those with learning or physical disabilities with support - especially if they are socially disadvantaged. If children's educational needs are not met, their future development might be negatively affected. For the optimal development of young children with special needs, access to inclusive education is crucial (Mag, Sinfield & Burns, 2017). However, in order to understand inclusivity within the South African context, I will first give a short exposition of the trajectory of inclusive education after 1994. In 1994, different education departments existed for each one of the four different population groups in South Africa, namely were black, coloured, Indian and white (Spaull, 2013). Policymakers were faced with significant challenges, as they were responsible for managing the transformation of the education system. Du Plessis (2013) goes on to explain that the inequalities of the past can be rectified if policymakers are able to create an education system that prioritises access to quality education. Subsequently, the *South African Schools Act* (SASA) was enacted in 1996, which meant that no learner could be denied access to any public school anymore, and that public schools were obligated to admit any learner without any prejudice. To support the aims and objectives of the SASA, the *White Paper 6* was adopted in 2001 and reflected the government's official position with regard to special needs education and the ways in which to promote an inclusive education system. Consequently, South Africa's position on inclusive education was altered to create a shift from the *medical model of disability*, which focuses on the impairments of the individual and their associated limitations, to the *social model of disability* aimed at finding solutions to problems within the education system (*cf.* 2.4). The *White Paper 6* reaffirmed the *social model of disability* as South Africa's approach to inclusivity. Accordingly, South Africa supports an education system that promotes social justice, social integration, inclusion and equity by "overcoming barriers in the system that prevent it from meeting the full range of learning needs" (RSA DoE, 2001: Section 1.4.4). As such, the country's approach to inclusive education is embedded in the human rights model that strives for inclusivity as well as the elimination of all barriers to learning that might affect learners with disabilities (*cf.* Donohue & Bornman, 2014).

South African public schools consist of mainstream schools, full-service schools and special needs schools. While mainstream schools provide learners with low levels of support, full-service and special schools provide specialised support for learners with disabilities and/or special educational needs. The Department of Basic Education (DBE)

released statistics in 2016, based on a school survey done in 2014, on the number of learners enrolled in the various types of schools. The figures indicate that between 12 and 13 million learners are taught in 1 681 private and 20 060 public schools, of which 453 are special schools. However, close to 600 000 learners with disabilities aged five to 18 are not attending any form of education, although there was an increase of 158 special schools over a twelve-year period as well as an increase in learner enrolment in special schools. There was also an increase in full-service/inclusive schools, from 30 in 2007 to 787 in 2014 (RSA DBE, 2014). These are schools that are fully prepared to support a diversity of learning needs. Nevertheless, even by increasing the number of special schools, and converting mainstream schools into full-service/inclusive schools, it is still estimated that only 60% of learners who start school will reach Grade 12 due to learning barriers. Donohue and Bornman (2014) note that the learning barriers in developing countries differ from those in developed countries. The *social model of disability* was believed to be the key to promoting inclusion. South African teachers were therefore trained in either general or special education. By implication, many teachers that are currently in the profession do not have the needed skills to be able to effectively teach learners with special needs in mainstream classrooms. While there has been a movement away from segregated education, the legacy it left behind still plays a key role in the present-day South African teaching culture, and this is reflected in the ways in which the education system is operated (Ntombela, 2011). In addition, when teachers are forced to teach learners with special needs and disabilities, it can often lead to them developing feelings of “cynicism, hopelessness and a rejection of transformation policies” (Oswald & Swart, 2011: 391). In this regard, Polat (2011) suggests that a change in attitudinal barriers among, teachers, especially those in developing countries, is essential for the successful implementation of inclusive education. Challenges in implementing inclusion strategies often arise when agreements have to be reached because of the diversity in language and ethnic groups in South Africa. People have different opinions and ideas, not only with regard to the needs of those with disabilities, but also regarding the ways in which its associated challenges should be addressed (Walton, 2018). If inclusive policies are too vague, these differences influence the ways in which inclusive practises are executed in the schools and classrooms, which can lead to conflict amongst staff and contribute to negative attitudes towards inclusion (Donohue & Bornman, 2014). A lack of resources at schools and support for teachers who lack the necessary skills to adapt their teaching classroom practises, also contribute to the general confusion surrounding inclusion (Bornman & Rose, 2010). Learners with special needs do not always have

access to special schools, and this has led to the development inclusive education policies that can enforced in mainstream schools. The availability of applicable policies is crucial to facilitate support for persons with disabilities and/or special needs in an educational setting (Walton & Nel, 2012). Although inclusive education policies have been adopted in order to address the different barriers that hinder teaching and learning, Donohue and Bornman (2014) state that a lack of clarity in inclusive education policies causes difficulties in attaining inclusive education goals, especially in a country like South Africa. Donohue and Bornman (2014) further argue that any disconnect between policy and practise can only be resolved when inclusion goals and implementation strategies are clarified, and education policies are enforced by the *South African Department of Education*. In 2014, the *Policy on Screening, Identification, Assessment and Support* was adopted to

provide a policy framework for the standardisation of the procedures to identify, assess and provide programmes for all learners who require additional support to enhance their participation and inclusion in school (RSA DBE, 2014: Section 1(1)).

Although there is legislation in South Africa that supports inclusive education, a study done by Dreyer (2017) at mainstream schools in the Western Cape indicated certain challenges with regard to inclusivity. The study revealed that teachers' knowledge of inclusive education is often restricted when attending to learners with severe intellectual impairments and physical disabilities. Substantial amounts of learners in classrooms, combined with a lack of resources, trigger various challenges for teachers, especially when having to accommodate learners with physical disabilities. In order for a learner in a wheelchair to safely move from one classroom to another, ramps need to be built, which often does not happen. Overcrowded classrooms also pose difficulties for these learners as they struggle to access classrooms in a wheelchair. Dreyer (2017) explains that teachers are concerned with the challenges that accompany the logistics that are involved when learners with physical disabilities and mental impairments are admitted in mainstream schools. These challenges are often overlooked for the sake of inclusion.

Dreyer's (2017) findings regarding legislation that support inclusive education in South African mainstream schools will be proved or disproved in the result section.

2.7 SUMMARY

To understand the concept of inclusive education in the South African context, I referred in this chapter to influential international treaties and the different approaches to inclusion. Theories on inclusive education vary from an inclusive special education theory, to full inclusion, to inclusive practices in mainstream schools and special education for those who have special educational needs. Implementation strategies of inclusive education differ from country to country and are usually supported by clear legislation based on a country's specific approach to inclusive education. In my exploration of four country case studies, namely Finland, Italy, Zimbabwe and Lesotho, I found that most inclusive education policies and their associated practices are intended to serve learners with disabilities and special educational needs in mainstream schools. Finland has adopted the inclusive special education theory, and subsequently implements specialised education in all mainstream classrooms. Learners are therefore not categorised based on their disabilities, but rather integrated into classrooms with their peers (*cf.* 2.5.1). In Italy, learners may not be refused access to public schools, irrespective of their disability or the nature of their special needs. Special and specific courses of action are therefore in place to support these learners. However, if the nature of the learners' disability inhibits their participation in mainstream settings, learners are encouraged to rather get involved in the country's skills development program that runs separately from the schools (*cf.* 2.5.2). In Zimbabwe, learners with disabilities and special educational needs can be assisted in mainstream classrooms, but teachers are often ill-equipped to cater for a wide variety of learning needs. Disability centres are therefore seen as a solution for those with disabilities and special educational needs that are not fully supported in mainstream schools (*cf.* 2.5.3). In Lesotho, a lack of identification and assessment policies often cause teachers to wrongfully identify learners with special educational needs (*cf.* 2.5.4). In reference to inclusive education in South Africa, I provided a brief overview, as the next chapter specifically focuses on the South African policy framework for inclusion. In South Africa, a learner cannot be denied access to any public school, and a variety of learners are accommodated in mainstream schools. However, if further support is needed, learners are often referred to special schools (*cf.* 2.6). As this study is focused on inclusive education within the South African context, the aim of the next chapter is to analyse policies and other related documents that influence inclusive education. It is my contention that an analysis of these policies and documents will enable me to position the *S/AS* policy within the existing South African education policy framework for inclusive education.

CHAPTER 3: THE SOUTH AFRICAN POLICY FRAMEWORK FOR INCLUSIVE EDUCATION

3.1 INTRODUCTION

South Africa, as many other countries in the Global South, has committed itself to extend advocacy programs for addressing discriminatory exclusionary practices and attitudes towards the improvement of education provision for those with disabilities (Muthukrishna *et al.*, 2016). In order to position the *SIAS policy* within the South African education policy framework for inclusive education (*cf.* 1.3.3), it is important to first analyse how inclusion in general, and especially for those with disabilities and barriers to learning, is advocated in official South African documents. The objective of Chapter 3 is therefore to foreground the South African policy framework for inclusion and inclusive education as the backdrop for understanding the *SIAS policy*.

Based on my understanding of intertextuality as the relationship between different documents, I analysed various documents with similar content regarding aspects of inclusion and inclusive education (*cf.* Taylor, Henry, Lingard & Rizvi, 1997). I first analysed the *Constitution of the Republic of South Africa* (Act 108 of 1996) as it is the most superior law that exists in South Africa, which provides the general legislative framework for access to education. After analysing the *Constitution*, I analysed the *National Education Policy Act* (1996) which is the national policy for education and is directed towards the protection and advancement of each person's basic rights as presented in Chapter 2 of the *Constitution* (*cf.* 3.3.2). I analysed the *South African Schools Act* (Act 84 of 1996) in order to determine how the act enforces inclusion within the education system. I deemed the analysis of *White Paper 6 Special Needs Education: Building an inclusive education and training system* (2001) as important because it presents South Africa's position and philosophy on inclusive education within public schools. The relevance of this document for this study lies in the fact that it sets out various strategies for schools to enable the promotion of inclusion (*cf.* RSA DoE, 2001). The aim of the analysis of the above-mentioned documents is to narrow down the policy contentions on access and inclusion in order to enable the analysis and positioning of the *SIAS policy* within this policy framework. It is my contention that the analysis of the latter will help me to foreground the components of the policy in detail as my study is focused on its implementation in mainstream schools. In addition, conducting a document analysis also had the advantage of providing me with sufficient knowledge to prepare for the focus group interviews, and the individual interviews used to

generate the necessary empirical data required to answer my research question (*cf.* 1.2.2).

3.2 DOCUMENT ANALYSIS

A document analysis involves a systematic evaluation of electronic and/or printed documents and/or policies in order to access specific information (*cf.* 1.5.2.2). In this section, I draw on primary documents that are all considered to be public documents, which in turn, make them suitable for document analysis (*cf.* O'Leary, 2014).

My analysis of documents in this study should be considered against the political history of South Africa. Many existing policies were severely impacted after the country became a true democracy in 1994. Prior to becoming a democracy, the education system was managed in terms of race and ethnicity. The amount of funding and support provided to schools and teachers differed greatly - in 1982 the government spent approximately R1 211 on the education of a white child compared to R146 for a black child (Rossouw & De Wet, 2016). Glaring discrepancies between the quality of education offered to the different racial groups were a barrier to the academic success of many learners. These differences are reflected when the number of university degrees obtained by white teachers is compared to that of black teachers. Statistics from 1982 indicate that one third of all white teachers at the time had university degrees compared to only 2.3% of black teachers (Rossouw & De Wet, 2016). After a history of segregation, the South African government considered a change in the education system as critical, and since 1994 various legislative policies have been promulgated towards the transformation of the South African education system (Muthukrishna *et al.*, 2016).

The enactment of the *Constitution* in 1996 was the start of transforming the education system of South Africa into an inclusive education system. The ways in which inclusive education would be advocated for those with disabilities and those experiencing barriers to learning in South Africa, become clear when analysing documents not only applicable in the South African context but also to this study. To do this, I drew on and analysed legislative documents which included the *Constitution of the Republic of South Africa* (Act 108 of 1996), the *National Education Policy Act* (1996) the *South African Schools Act* (Act 84 of 1996), *Education White Paper 6 Special Needs Education: Building an Inclusive Education and Training System* (2001) and the *Policy on Screening, Identification, Assessment and Support* (2014). Examining policies and other related primary documents

enabled me to access specific information regarding the overall framework for inclusion within the South African education system. In the subsequent exposition, I provide conclusions drawn from the document analysis and provide support from relevant literature. As stated, it was my intention that the analysis of documents and policies that promote inclusion would create the basis to expand my knowledge of inclusive education in the South African context. I was also able to position the *SIAS* policy within the existing South African policy framework.

3.3.1 Constitution of the Republic of South Africa (1996)

According to the 2015/2016 *South African Yearbook*, education in South Africa is governed by various policies and legislation, and in order to comment on the development, maintenance and support of the education system, one would typically start with the supreme law, namely the *Constitution of the Republic of South Africa* of 1996. According to the *Department of Justice and Constitutional Development* (DoJ & CD), a constitution is a set of fundamental principles that determines the ways in which a country is governed. It sets out how the different elements of government are organised and it contains rules on which powers are exercised and upon whom. A constitution specifies the duties and rights of the citizens of a country, together with the mechanisms that control power (DoJ & CD, 2019). The supremacy of the *Constitution* is foregrounded, as any “law or conduct inconsistent with it is invalid, and the obligations imposed by it must be fulfilled” (RSA, 1996a: Section 1). All policies must therefore be in alignment with the *Constitution*, and no education policy can be developed or implemented without considering the rights of all South African citizens as stipulated in the *Constitution*.

In order to consider education in the South African context, it must be noted that the *Constitution* is founded “on the values of human dignity, the achievement of equality and the advancement of human rights and freedoms” (RSA, 1996a: Section 1(a)). The values mentioned should be read together with the government’s adherence to achieving equality along with non-discrimination as espoused in Section 9, according to which

- (1) [e]veryone is equal before the law and has the right to equal protection and benefit of the law.
- (2) Equality includes the full and equal enjoyment of all rights and freedoms. To promote the achievement of equality, legislative and other measures designed to protect or advance persons, or

categories of persons, disadvantaged by unfair discrimination, may be taken.

Based on the principle of equality, the *Constitution* is very clear on the issue of unfair discrimination, and stated in Section 9, sub-section 3 that

- (3) [t]he state may not unfairly discriminate directly or indirectly against anyone on one or more grounds, including race, gender, sex, pregnancy, marital status, ethnic or social origin, colour, sexual orientation, age, disability, religion, conscience, belief, culture, language and birth.

By implication, and since discrimination is strictly prohibited through the enactment of Section 9, no individual of school-going age may be denied access to education based on any of the abovementioned grounds. This clause on non-discrimination is reaffirmed by Section 29(1), which clearly states that everyone has an equal right “to a basic education, including adult basic education”. Section 30 states that each individual is warranted to “receive education in the official language or languages of their choice in public educational institutions where that education is reasonably practicable”.

It should be noted that the *Constitution’s* protection and promotion an individual’s right to basic education refers to having access to education, and to the obligation of the state to guarantee that access to education can be utilised by everybody. This right is promised immediately, which means that no learner has to wait before receiving access to education. Sections 9 and 29 are particularly important as they promote the protection of all learners. The government therefore has a responsibility to render all learners with access to basic education. As stipulated throughout the *Constitution*, the government has a commitment to develop policies that enforce equality. Section 9(2) affirms that

[e]quality includes the full and equal enjoyment of all rights and freedoms. To promote the achievement of equality, legislative and other measures designed to protect or advance persons, or categories of persons, disadvantaged by unfair discrimination may be taken.

It can therefore be agreed with Sayed and Motala (2012) that the *Constitution* ensures and enforces a democratic approach to all facets of life, including education, in that all children must be able access to basic education. Meny-Gilbert and Russell (2012) conducted a social survey that supported the idea that the enforcement of the right to basic education results in more children enrolling in schools, higher school attendance and lower repetition

and dropout rates in primary schools. The South African government has made good progress in providing post-apartheid basic education (National Treasury, 2015) The *Constitution* subsequently provides the legislative background for various legislation, policies, strategies and interventions that have been passed by government to ensure the safeguarding of equal access to education (Sayed & Motala, 2012). It can be assumed that many of these policies focus on addressing inequalities, not only concerning race, age and/or gender, but also disability. The Department of Education has various acts and policies in place that intend to implement the government's legal and constitutional obligations towards including learners with disabilities into mainstream schools (UNICEF, 2011). The purpose of these acts and policies is to provide learners with disabilities and those experiencing other barriers to learning with adequate support to access education. In the subsequent sections the *National Education Act* (1996), the *South African Schools Act* (1996), the *Education White Paper 6 Special Needs Education: Building an Inclusive Education and Training System* (2001) and the *Policy on Screening, Identification, Assessment and Support* (2014) are discussed.

3.3.2 National Education Policy Act (1996)

The preamble of the *National Education Policy Act (NEPA)* (1996) suggests that

it is necessary to adopt legislation to facilitate the democratic transformation of the national system of education into one which serves the needs and interests of all the people of South Africa and upholds their fundamental rights (RSA,1996c).

Through its legislative power, *NEPA* is subsequently responsible for supporting the transformation of the South African education system in order to guarantee that the national education policy is aimed at “the advancement and protection of the fundamental rights of every person” (RSA, 1996c: Section 4(a)). In alignment with the *Constitution* (*cf.* RSA, 1996a: Section 9) and in terms of the parliament's ratification of international conventions, *NEPA's* objective to monitor and evaluate education (*cf.* Section 2) is premised on the entitlement

- (i) of every person to be protected against unfair discrimination within or by an education department or education institution on any ground whatsoever;
- (ii) of every person to basic education and equal access to education institutions (RSA, 1996c: Section 4(a)).

NEPA subsequently aims to ensure that “no person is denied the opportunity to receive an education to the maximum of his or her ability as a result of physical disability” (RSA, 1996c: Section (4)(d)). By implication, all individuals, including those with disabilities, are sanctioned to receive quality education. As South Africa advocates inclusion, learners with disabilities are not only warranted to receive quality education, but also to be integrated into mainstream classrooms with their peers. Inclusion is therefore promoted and maintained through policies and the legislation that protect it. While *NEPA* serves as the legislative power for the transformation of the national education system, the *South African Schools Act* of 1996 provides guidelines for the attainment of education in South African schools.

3.3.3 South African Schools Act (1996)

NEPA is in alignment with the *SASA*, which was promulgated in 1996 as the policy framework for education in South Africa. As noted by Du Plessis (2013), one of the most significant pieces of legislation to ensure the enactment of Section 29 of the *Constitution*, was the *SASA*. As with all acts, the *SASA* is an example of a bill that has passed through specific legislative steps in order for it to become law (Du Plessis, 2013). The enactment of the *SASA* had as its main purpose to

provide for a uniform system for the organisation, governance and funding of schools; to amend and repeal certain laws relating to schools; and to provide for matters connected therewith (RSA, 1996b: Section 3).

As a fundamental national education law, the *SASA* plays an important role in establishing a standardised education system through its focus on upholding “the rights of all learners, parents and educators, and promote their acceptance of responsibility for the organisation, governance and funding of schools in partnership with the State” (RSA, 1996c: Preamble). It is through the acceptance of this responsibility that the *SASA* aims to “provide an education of progressively high quality for all learners” (RSA, 1996b: Preamble). One can therefore assume that learners with disabilities and special education needs will also enjoy the right to an education of “progressively high quality”.

To safeguard the right to education without discrimination, the *SASA* promotes equality through access to quality education. With regard to admission to public schools, Section 5(5) stipulates that a school’s governing body is responsible for creating its admission policy, which in turn, must be aligned with the stipulation in Section 5(1) that “[a] public school must admit learners and serve their educational requirements without unfairly

discriminating in any way”. Thus, in alignment with Section 9(3) of the *Constitution*, no child may, by law, be refused entry to a public school based on *inter alia*, race, religion, disability, culture, pregnancy or HIV status. In addition, no governing body is allowed to “administer any test related to the admission of a learner to a public school, or direct or authorise the principal of the school or any other person to administer such test” (RSA, 1996b: Section 5(2)). It is also important to note that school attendance is compulsory from the first school day of the year in which such learner reaches the age of seven years until the last school day of the year in which such learner reaches the age of fifteen years or the ninth grade, whichever occurs first (RSA, 1996b: Section 3(1)).

It is the responsibility of the parent(s) and/or guardians to ensure that the children in their care attend school. In fact, any parent(s) or guardian(s) who withhold a child under the age of fifteen, or before completing Grade 9, from school “is guilty of an offence and liable on conviction to a fine or to imprisonment for a period not exceeding six months” (RSA, 1996b: Section 3 (6)(a)(1)). To enhance access, parents or guardians who are financially unable to afford schooling can apply for the dispensation of school fees as schools are required to adopt a resolution that provide for “[e]quitable criteria and procedures for the total, partial or conditional exemption of parents who are unable to pay school fees” (RSA, 1996b: Section 39(b)). While parents or guardians are responsible for a child to attend school, the main responsibility rests with the school’s governing body:

A governing body of a public school must take all reasonable measures within its means to supplement the resources supplied by the State in order to improve the quality of education provided by the school to all learners at the school (RSA, 1996b: Section 36(1)).

As mentioned by Mestry (2017), the South African government makes an effort to secure access to education for the poorest and most vulnerable members of society through substantive equality.

Of significance for all learners, particularly those with disabilities and special needs, is the responsibility of the governing body to allocate available resources in a way that uplifts the quality of education. In addition, if need be, state-supplied resources must be supplemented to ensure quality education (RSA DoE, 2001). Using resources to support those with disabilities and special educational needs is vital for advancing inclusion and equality. According to the CRPD (2006), the use of assistive technology in classrooms, especially for those with disabilities, enhances the quality of education. Assistive

technology helps learners with disabilities to participate in learning, and the devices used are usually modified according to the disability of the learner (MacLachlan, 2018).

Resources not only include financial support, but also include seeing teachers as a valuable resource. In Section 6.5, the *SASA* stipulates that a teacher

has the same rights and obligations as a parent to protect, control and discipline a learner according to the Code of Conduct during the time the learner is in attendance at the school.

Teachers are not only responsible for providing a high standard of instruction to learners, but they must also assist in the holistic development of the child. In order to adhere to the code of conduct of the school, teachers are expected to continuously assist in promoting and protecting the fundamental rights of their learners (RSA DoE, 1996b). Besides the responsibilities that teachers have to protect the rights of learners, it is also the school's responsibility to do so as every public school is "a juristic person, with legal capacity to perform its functions in terms of this Act" (RSA DoE, 1996: Section 15). Schools therefore have an obligation to uphold the principles set out in the *SASA* and to make sure that these principles are adhered to by all parties and entities involved with the school, in a lawful manner. As stipulated by Section 9 of the *Constitution*, one of most fundamental human rights that need to be protected is equal treatment, and by implication, protection from discrimination. Equality is promoted by the *SASA*, and in order to ensure equality for all and specifically for those with disabilities and special educational needs, the *White Paper 6* foresees in 2001

[w]ithin mainstream schooling, the designation and conversion of approximately 500 out of 20,000 primary schools to full-service schools, beginning with the 30 school districts that are part of the national District Development Programme (RSA DoE, 2001: Section 1.5.6.3).

According to the DBE's *Guidelines for Full-Service Schools* (2010), Full-Service Schools (FSS) are defined as

mainstream education institutions that provide quality education to all learners by supplying the full range of learning needs in an equitable manner. They should strive to achieve access, equity, quality and social justice in education (DBE, 2010a: Section1).

As FSS are equipped to teach and support a full range of learning needs, the focus is subsequently directed at inclusive education. The ultimate goal of inclusive education is to provide learners with a quality education. In 2017 the *Inclusive Education and Special*

Education: DBE Progress Report indicated that South Africa already had 715 FSS. This number surpassed the original goal of 500 set out by the department in 2001. But when compared to the remaining number of mainstream schools, the number that has already been converted seems very small. By implication, any mainstream school should be able to accommodate and support a wide range of learning needs any mainstream school. The conversion of mainstream schools to FSS aligns with the stipulations in Section 12 in the SASA that

- (3) A public school may be an ordinary public school or a public school for learners with special education needs and
- (4) The Member of the Executive Council must, where reasonably practicable, provide education for learners with special education needs at ordinary public schools and provide relevant educational support services for such learners (RSA DoE, 1996b).

Following from the SASA, the intention of the DoE was to convert mainstream schools into full-service schools, to prioritise teacher training and to differentiate instruction (RSA DoE, 2001). Providing quality education and subsequent inclusive education practises requires a flexible curriculum and assessment techniques adapted for those with special educational needs (RSA DBE, 2010b). To promote and implement inclusive education practises, the *Education White Paper 6 Special Needs Education: Building an Inclusive Education and Training System* is often referenced.

3.3.4 Education White Paper 6: Building an Inclusive Education and Training System (2001)

One of the main intentions of the *White Paper 6* is to

extend the policy foundations, frameworks and policy for all bands of education and training so that our education system will recognise and accommodate the diverse range of learning needs (RSA DoE, 2001: Section 2.1.1).

In order to support a variety of learning needs in mainstream classrooms, *White Paper 6* endorses the implementation of inclusive education. The DoE (2007) refers to inclusive education as an

education and training system that promotes education for all and fosters the development of inclusive and supportive centres of learning that enable all learners to participate actively in the education process so that they can

develop and extend their potential and participate as equal members of society (RSA DoE, 2007 Section 4.2.1).

The focus of inclusion therefore centres on all members of society having equal access to education opportunities. As the government has an obligation and commitment to provide basic education to all learners, the essence of the *Constitution*, foregrounding equity, guided the development of the *White Paper 6*. In this regard, *White Paper 6* (RSA DoE, 2001: Section 1.1.5) outlines

how the education and training system must transform itself to contribute to establishing a caring and humane society, how it must change to accommodate a full range of learning needs and the mechanisms that should be in place.

Acknowledging barriers to learning is essential for ensuring that a broader spectrum of difficulties than just disabilities is addressed. A broader spectrum of difficulties that could affect learning includes systemic barriers, social barriers, pedagogical barriers and intrinsic barriers (RSA DoE, 2001). According to Muthukrishna *et al.* (2016), systemic barriers include overcrowded classrooms, a lack of policy implementation and inaccessible school-buildings. Social barriers refer to a lack of safety and security, poverty, abuse, bullying and the impact of HIV/AIDS. Pedagogical barriers to learning include under-qualified and unqualified teachers, inappropriate teaching methods, and inaccessible learning materials. Intrinsic barriers refer to physical, neurological, intellectual and sensory disabilities and emotional and behavioural problems. As noted in Section 1.5.1, barriers to learning can stem from

physical, mental, sensory, neurological and developmental impairments, psycho-socio disturbances, differences in intellectual ability, particular life experiences or socio-economic deprivation.

Barriers to learning can subsequently be the result of an array of existing issues (RSA DoE, 2001). Learners with barriers to learning must often cope with an inflexible curriculum that does not account for specific learning needs. An inflexible curriculum coupled with poor teacher training and a lack of sufficient support services to learners and teachers, all contribute to a learning environment that is non-conducive for learners with barriers.

From the analysis, it seems as if South Africa's position on inclusive education is *inter alia*, informed by the social model of learning disabilities, in which barriers to learning must be fixed by society (*cf.* 2.6). By implication, accepting the social model of disability means that the barriers within the society must not only be attended to, but also overcome, in order to establish a fully inclusive education system. In South Africa, where a number of issues exist, achieving full inclusion will be a mammoth task. However, it is against this broad spectrum of learning barriers that *White Paper 6* established a framework to achieve numerous international norms and standards of inclusion in South Africa. As noted by Du Plessis (2013; Boezaart, 2017), *White Paper 6* support the aims and objectives of the SASSA. In providing guidelines for access to quality education through the necessary support of an inclusive education system, *White Paper 6* subsequently contributes to the SASSA's vision "to provide an education of progressively high quality for all learners" (RSA, 1996b: Preamble). In order to do so, *White Paper 6* endorses the implementation of various educational support services to be implemented, depending on the learner's type of disability and the level of support that he/she requires. Learners in need of little support will be able to acquire this support in any mainstream school. Learners in need of moderate levels of support will be able to find such support in full-service schools. Those who require more intensive support need to be referred to special schools in order to receive it (RSA DoE, 2001). By differentiating between the various learning barriers and levels of support, it is understood that some learners are in need of more support than others - the extent of the support is subsequently determined by the different learning needs of learners. In recognition of diversity in learner needs, the *White Paper 6* emphasises the importance of establishing quality education through the "absence of a uniform resourcing strategy and national provisioning norms for learners with disabilities" (RSA DoE, 2001: Section 1.3.6). This statement implies that resources provisioning will be based on the support needs of the school together with its learners – as needs may differ, different resources will be distributed, albeit with the aim to ensure that learners receive quality education.

According to the *Guidelines for Inclusive Schools* (DBE, 2010), the key components of support of the *White Paper 6* are special schools as resource centres (SSRC), full-service schools (FSS), mainstream schools, institution-level support teams (ILST) and district-based support teams (DBST). In Section 1.5.6. clarification is provided for these components. SSRCs are tailored to learners in need of intensive support because of severe barriers to learning. On-site support is provided by SSRC's to the school's learners,

learners from neighbouring schools and other members of the community with severe learning needs. FSSs provide moderate support for learners and serve as referral and resource centres for mainstream schools and their surrounding communities. When compared to SSRCs and FSSs, mainstream schools provide the lowest level of support to learners who experience barriers to learning. However, if additional support is required by a learner, the teachers are able to refer him/her to a SSRC or a FSS. An ILST is located at each school and is responsible for identifying learner support needs and facilitating the provision of support. DBSTs oversees the provision of support of a specific district, and is responsible for preparing and allocating funding for additional support needs that may arise within the district (RSA DoE, 2001). Implementing inclusive education in South Africa faces many challenges. As noted by D'amant (2012), these include the sustainability of pilot projects, insufficient teacher development and assistance, and sub-standard education management. It has also been indicated that mainstream schools seldom have the resources or facilities needed to address a wide range of special needs, even after being converted to full-service schools (Zungu, 2014). Various implementation strategies have been created to guarantee that the aims of the *White Paper 6* are achieved. One of these is the enactment of the *Policy on Screening, Identification, Assessment and Support* in 2014.

To position the *SIAS* policy within the existing policy framework for inclusion and inclusive education in South Africa, I first provide an exposition of the policy framework as derived from my document analysis (*cf.* Table 3.1).

3.4 POLICY FRAMEWORK FOR INCLUSIVE EDUCATION

As noted, the objective of Chapter 3 is to foreground the South African policy framework for inclusion and inclusive education as the backdrop for understanding the *SIAS* policy. In drawing on the analysis of the documents, I constructed a framework that constitutes legislative support for inclusive education in South Africa (*cf.* Table 3.1). The policy framework consists of the *Constitution of the Republic of South Africa* (Act 108 of 1996), the *National Education Policy Act* (Act 27 of 1996), the *South African Schools Act* (Act 84 of 1996) and the *Education White Paper 6 Special Needs Education: Building an Inclusive Education and Training System* (2001). The legislative power of the framework is illustrated through the status of each document, the position of each on inclusion in education and its implications for inclusive education. The policy framework therefore acts as the legislative authority within which the *SIAS* policy is couched.

Table 3.1: Policy framework for inclusive education

Document	Status of the document	Position on inclusion in education	Implications for inclusive education
<p><i>Constitution of the Republic of South Africa</i> (1996)</p>	<p>The <i>Constitution</i> is the “supreme law of the Republic; laws or conduct inconsistent with it is invalid, and the obligations imposed by it must be fulfilled” (RSA, 1996a: Section 2).</p> <p>This document provides a legal framework of fundamental principles and rules on which all policies, including education policies, are based.</p>	<p>According to Section 29(1)(a) “everyone has the right to a basic education”.</p> <p>Section 9(1) states that “everyone is equal before the law”, while sub-Section 2 stipulates that in order to “promote equality, legislative and other measures designed to protect or advance persons, or categories of persons, disadvantaged by unfair discrimination may be taken” (RSA 1996a).</p> <p>The Constitutional framework as well as the right to education is therefore primed by:</p> <ul style="list-style-type: none"> • equality • non-discrimination 	<p>The <i>Constitution</i> is founded on “the values of human dignity, the achievement of equality and the advancement of human rights and freedoms” (RSA, 1996a: Section 1(a)).</p> <p>The right to basic education together with the commitment made in Section 9 to achieve equality and non-discrimination ensures that all learners are included in education.</p> <p>Therefore, learners with disabilities have the same rights as their peers.</p>
<p><i>National Education Policy Act</i> (1996) (<i>NEPA</i>)</p>	<p><i>NEPA</i> is aimed at protecting every individual’s fundamental rights, in particular the right “of every person to be protected against unfair discrimination within or by an education department or education institution on any grounds whatsoever” (RSA DoE, 1996c: Section 4(a)(i)).</p> <p><i>NEPA</i> therefore provides</p>	<p><i>NEPA</i> ensures inclusion through the “protection of the right of every person to basic education and equal access to education institutions” (RSA DoE, 1996c: Section 4(a)(ii)).</p> <p>In alignment with the constitutional values, <i>NEPA</i> supports transformation in education through the protection of unfair</p>	<p>The <i>Constitution</i> makes provision for protection from discrimination. <i>NEPA</i> advances the fundamental right “of every person to be protected against unfair discrimination within or by an education department or education institution on any ground whatsoever” (RSA DoE, 1996c: Section 4(a)(1)).</p>

	legislation that facilitates the democratic transformation of the South African education system.	discrimination and ensuring equal access to educational institutions.	As <i>NEPA</i> promotes “basic education and equal access to education institutions” (RSA DoE, 1996c: Section 4(a)(2)), it can be accepted that learners with disabilities have the same right(s) to educational institutions as their peers.
<i>South African Schools Act (1996) (SASA)</i>	<p>The <i>SASA</i>’s objective is “[t]o provide for a uniform system for the organisation, governance and funding of schools; to amend and repeal certain laws relating to schools; and to provide for matters connected therewith” (RSA DoE, 1996b: Preamble).</p> <p>The <i>SASA</i> is a policy framework that standardises the various elements within the South African education system by focusing on the responsibility of all parties involved in the governance, organisation as well as the funding of schools (RSA DoE, 1996b).</p>	<p>The <i>SASA</i> makes provision for all learners to gain entry to public schools by stating that “[a] public school must admit learners and serve their educational requirements without unfairly discriminating in any way” (RSA DoE, 1996b: Section 5(1)).</p> <p>The <i>SASA</i> reaffirms the values of <i>NEPA</i> and aims to improve the quality of education by transforming the education system through the standardisation of education practises.</p>	<p>In alignment with the <i>Constitution</i> and <i>NEPA</i>, the <i>Guidelines for the Code of Conduct for learners</i> of the <i>SASA</i> stresses non-discrimination: “No person may unfairly discriminate against a learner. All learners shall enjoy equal treatment before the law and shall receive equal protection and benefits of the law” (RSA DoE, 1996b: Section 4.2).</p> <p>Learners with disabilities are safeguarded against discrimination under the same law as their peers. All learners, irrespective of any disability, must be included in education.</p> <p>No learner(s) can be excluded from a public school based on his or her disability.</p>
<i>Education White Paper 6 Special Needs Education: Building an</i>	<i>White Paper 6</i> indicates “how the education and training system must transform itself to contribute to establishing a caring and	Coinciding with the values of the <i>SASA</i> , <i>White Paper 6</i> emphasises the transformation of the education system to accommodate a full	<i>White Paper 6</i> lays out the commitment of the Ministry “to the provision of educational opportunities, in particular for

<p><i>Inclusive Education and Training System (2001) (White Paper 6)</i></p>	<p>humane society, how it must change to accommodate the full range of learning needs and the mechanisms that should be put in place” (RSA DoE, 2001: Section 1.1.6).</p> <p>This document enables the education policy framework to be extended to accommodate a diverse range of learning needs. In doing so inclusion is promoted.</p>	<p>range of learning needs in an attempt to identify and resolve learning barriers.</p>	<p>those learners who experience or have experienced barriers to learning and development” (RSA DoE, 2001: Section 1.1.5).</p> <p>Transforming the education system involves being able to create an environment that can accommodate a diverse range of learning needs in an attempt to promote inclusion.</p>
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3.5 POLICY ON SCREENING, IDENTIFICATION, ASSESSMENT AND SUPPORT

Creating a policy framework for inclusive education allowed me to establish the fundamental principles on which inclusive education in South Africa is based. The *Constitution* (1996), *NEPA* (1996), *SASA* (1996) and *White Paper 6* (2001) were analysed to position the *SIAS* policy of 2014 within the existing policy framework for inclusive education. The *Constitution* promotes equality and non-discrimination, and states that every person has the right to receive basic education. In alignment with the *Constitution*, *NEPA* and the *SASA* also promote equality and non-discrimination, but is aimed specifically at education. Learners all have an equal right to access education and cannot be discriminated against based on any disability. *White Paper 6* guides the ways in which the South African education system should be transformed in order to accommodate a variation of learning needs. It is within this legislative framework that the *SIAS* policy is positioned with the aim to improve “access to quality education for vulnerable learners and those who experience barriers to learning” (RSA DBE, 2014: Section 1(2)). In the subsequent sections, I give a contextual orientation of the *SIAS* policy, followed by an exposition of the content of the document.

3.5.1 Contextual orientation

With the introduction of the *SIAS* policy in 2014, the Minister of Basic Education, Angelina Matsie Motshekga, stated that

[t]he *SIAS* policy aims to respond to the needs of all learners in our country, particularly those who are vulnerable and most likely to be marginalised and excluded (RSA DBE, 2014: Foreword).

In particular, the intention of the *SIAS* policy is to

provide a policy framework for the standardisation of the procedures to identify, assess and provide programmes for all learners who require additional support to enhance their participation and inclusion in school (RSA DBE, 2014: Section 1(1)).

The *SIAS* policy was subsequently enacted to reinforce inclusive education practices in an attempt to respond to an array of learning needs that exist amongst the youth of South Africa, but in particular, to provide sufficient support to school-aged children who experience learning barriers, in order to exercise their right to basic education (RSA DBE, 2014). Successful execution of the *SIAS* policy attempts to realise South Africa’s obligations of Article 24 of the UNCRPD (2006), which affirms that

persons with disabilities have a right to access an inclusive, quality, free, primary and secondary education on an equal basis with other young people in the communities in which they live (RSA DBE, 2014: Foreword).

This article also declares that “there will be zero rejection of learners on the basis of their disability” (RSA DBE, 2014: Section 4(1)). Consequently, no person with a disability may be refused access to education as a result of any disability.

Since 1994, South Africa has embraced inclusivity as part of a democratisation process. In so doing, a social model of disability was adopted (Landsberg, Krüger & Swart, 2011). Thus, framed within the policy framework for inclusivity, the *SIAS* policy shifts

the focus to a holistic approach where a whole range of possible barriers to learning that a learner may experience (such as extrinsic barriers in the home, school or community environment, or barriers related to disabilities) are considered (RSA DBE, 2014: Section 8(1)).

Mfuthwana and Dreyer (2018) support South Africa’s rejection of the *medical model of disability* which was used in the past, and favours the *social model of disability*. As indicated, the *medical model of disability* assumes that learners’ incapacities are caused by trauma or health conditions that can be corrected through professional intervention (*cf.* 2.4). The *social model of disability* recognises the impact of society on learners’ ability to develop and learn, and focuses on removing any barriers that could hinder equal participation in the learning process (RSA DoE, 1997). An education system premised on the *social model of disability* will assume that the community and stakeholders must work together to support individuals with disabilities, for the sake of creating inclusive schools. In accepting this approach,

- (5) The policy advocates a shift from a system where learners are referred to another specialised setting other than the school nearest to their home, where a request is made for assistance to be delivered at the current school.
- (6) The child must be viewed within his or her context. The extent to which intrinsic factors, the home and school context, are impacting on his or her accessing education, remaining enrolled and achieving to his or her optimum potential, must be evaluated (RSA DBE, 2014: Section 7(5 and 6)).

The *social model of disability* approach subsequently implies that each learner in South Africa must receive support at the school that they attend, rather than to be referred to

special schools because of inadequate support in mainstream schools. South Africa's approach to disability is reaffirmed in Section 12(3), according to which

[t]he availability of the range, nature and level of support programmes, services, personnel and resources may be at site level or at nodal sites to be accessed by a cluster of schools. This will be one of the main mechanisms to ensure that learners can access support without the need to move to any school other than their ordinary neighbourhood school (RSA DBE, 2014).

However, if learners are in need of intense support, support becomes more specialised and the resources available at mainstream schools are often insufficient (RSA DBE, 2014). Therefore

[h]ighly-specialised support resources, personnel, programmes and facilities for a group of learners with high support needs requiring access to the same support programme or resources on a high-frequency basis, can be provided at site level such as in special schools or specialised settings attached to ordinary schools (RSA DBE, 2014: Section 12(4)).

The South African education system is subsequently not based on full inclusion as in certain other countries (*cf.* 2.6). Although any learner can be included in a mainstream school, the resources available at schools differ. If the resources at a certain school are insufficient to support a learner's specific learning needs, the learner often gets referred to a special school. Consequently, the aim of the *S/AS* policy is to make sure that learners who suffer from learning barriers can access not only quality education, but also the necessary support. This includes

- (a) [l]earners in ordinary and special schools who are failing to learn due to barriers of whatever nature (family disruption, language issues, poverty, learning difficulties, disability, etc.);
- (b) Children of compulsory school-going age and youth who may be out of school or have never enrolled in a school due to their disability or other barriers (RSA DBE, 2014: Section 2).

According to Dreyer (2015), an increase in social consciousness caused the aims of inclusive education policies, and the ways in which they are implemented, to be redefined. An increased social consciousness has the potential to bring about systemic changes to ensure quality education and sufficient learner support that was inconsistent in previous years (RSA DoE, 2010). Amidst the inconsistencies in support provision and other

contextual factors that learners with special educational needs face in South Africa, policies like the *SIAS* has been developed to address such challenges (Mfuthwana & Dreyer, 2018). The *SIAS* policy is seen as

a key procedure to ensure the transformation of the education system towards an inclusive education system in line with the prescripts of *Education White Paper 6 on Special Needs Education: Building an Inclusive Education and Training System* (2001) (RSA DBE, 2014: Section 1(6)).

The *SIAS* policy therefore intends to alter the education system by providing “clear guidelines on enrolling learners in special schools and settings which also acknowledge the central role played by parents and teachers” (RSA DBE, 2014 Section 1(7)). When schools and teachers are provided with specific, standardised guidelines for learners with barriers to learning, more consistent *screening, identification, assessment* and *support* processes are created. Standardised guidelines ensure equitable funding, admission and support practices (RSA DBE, 2014). Subsequently, the *SIAS* policy provides schools and teachers with a policy framework that enables teachers to respond systemically to a broad spectrum of learning needs (Mfuthwana & Dreyer, 2018). The *screening, identification, assessment* and *support* process acknowledges learners, teachers and parents as part of assessment and support processes that take place for learners suspected of experiencing barriers to learning (Mfuthwana & Dreyer, 2018).

3.5.2 Policy content

The intention of the *SIAS* policy is “to provide a policy framework for the standardisation of the procedures to identify, assess and provide programmes for all learners who require additional support to enhance their participation and inclusion in school” (RSA DBE, 2014: Section 1). The policy subsequently contains specific protocols and official forms for teachers, SBSTs and DBSTs to assist in screening, identifying and assessing learning barriers, with the aim to create a support provision plan which is monitored by the DBST (*cf.* Section 1). An inclusive education system is rationalised within the South African context, and reference is made to the treaties, policies and laws that inform the *SIAS* policy towards the achievement of inclusion (*cf.* Section 2). The components of the policy document include screening, identifying and assessing the learner, as well as the possible barriers to learning upon which support strategies are developed (*cf.* Section 6, 8 & 9). In Section 11, the competencies of the teachers, the SBSTs and the DBSTs are discussed as that “[c]ertain competencies of the *SIAS* process lie with different levels of authority within

the system” (RSA DBE, 2014: Section 11(1)). Section 12 gives attention to the long and short-term goals and strategies for building an inclusive education system, as well as strategies for change in designated focus areas. Section 13 places the focus on institutional arrangements for the delivery of support, while Section 14 explores specialised support programmes and the range of learning barriers it is concerned with. In Section 15, the descriptors of the nature and level of support is indicated, while Sections 16 - 23 set out the school arrangements related to the policy. More specifically, plans for integrated community-based support provision are described in Section 16, while Section 17 focuses on the alignment of the *SIAS* policy with similar systems and policies in both basic and higher education. In Section 18, the ways in which the *SIAS* policy is aligned with the *Inclusive Education Policy* are described. Section 19 highlights specific norms and standards with regard to resource provision and distribution. The *SIAS* policy’s alignment with health services and social services as well as the *Care and Support for the Teaching and Learning* programme are emphasised in Sections 20, 21 and 22 respectively. The policy implementation plan for 2015 - 2019 is revealed in Section 23. The stages of the *SIAS* protocol and the components of the policy, which include the screening, identifying and assessing of the learner, together with learning barriers and support strategies, are reviewed in Section 24. As my study is centred on the experiences of mainstream schools with the implementation of the *SIAS* policy, and since the key components of the policy are issues related to *screening, identification, assessment* and *support*, my exposition of this policy draws primarily on Sections 6, 8 and 24.

3.5.2.1 Screening

In Sections 6 and 24 of the *SIAS* policy, attention is given to what the screening process entails and how it should be executed. According to Section 6, the support needs of a learner must first be determined through a screening process. Section 24 of the policy further states that “[t]he teacher must screen all children at admission as well as in the beginning of each phase and record their findings in the Learner Profile” (RSA DBE, 2014). Screening a learner enables the teacher to identify possible problems that hinder learning, which in turn, determines the support practises required. Screening is done by gathering as much information as possible on the learner in question. This comes as the policy “outlines the protocol that has to be followed in identifying and addressing barriers to learning that affect individual learners throughout their school career” (RSA DBE, 2014: Section 6(3)). Upon admission or at the beginning of a new phase, which includes the *Foundation phase* (Grades 1 - 3), the *Intermediate phase* (Grades 4 - 6), the *General*

Education and Training phase (Grades 7 - 9) and the *Further Education and Training phase* (Grades 10 - 12), all learners must be screened and their information updated. The screening of learners indicates the beginning of the implementation of the *SIAS* policy and provides a learner with

guidance on how further support and interventions must be made available to learners who have been identified through the screening processes conducted through the Integrated School Health Programme (RSA DBE, 2014: Section 6(5)).

By implication, screening a learner involves gathering as much information as possible of the learner and then keeping record of that information. Information can be gathered from the learner's application form, the *Road to Health Booklet* that is only applicable to the *Foundation phase*, the *Integrated School Health report*, end-of-year school report cards, reports from parents and professionals who have worked with the learner, and reports from teachers who are currently involved with the learner (RSA DBE, 2014). This information is used by the teacher to complete a *Learner Profile*. The *Learner Profile* includes a learner's medical and personal information, as well as the personal information of his/her parents. Sections to be completed relate to the areas that need ongoing support, participation in extra-curricular activities, academic, culture and sport achievements, and an academic record. Learners' participation in extra-curricular activities and academic records must be updated annually (RSA DBE, 2014: Learner Profile). In order to complete the *Learner Profile* and compile a profile document for the learner, the learner's application form, copies of his/her birth certificate, the *Road to Health Booklet*, transfer documents, indemnity forms, letters from parents, absenteeism letters, medical reports, intervention reports, report cards and the SNA 1 and 2 forms must be attached. The SNA 1 and 2 forms indicate the school level interventions of the teachers and the SBST respectively. As the learner's information needs to be updated regularly, the screening process is on-going and integrated into the other aspects highlighted in the *SIAS* policy, which includes *identification, assessment and support* (RSA DBE, 2014).

3.5.2.2 Identification

According to Section 6, the *SIAS* policy is arranged in a simple way that allows teachers to recognise the learners' support needs, and how to provide those who require additional support with a support program to enhance their participation in school. In order to optimise learner participation, the intention of the *SIAS* process is to evaluate the extent as well as the level of support required in classrooms and schools in their entirety. It is in this

regard, the policy outlines “a process of identifying individual learner needs in relation to the home and school context, to establish the level and extent of additional support” (RSA DBE, 2014: Section 6 (2)(a)).

The identification stage of the *SIAS* process foregrounds the important role that teachers play in identifying possible learning barriers that could hinder learner participation in school. If, after *screening*, a learner is identified as vulnerable, Section 24 states that “it is the responsibility of the teacher to assume the role of a case manager, driving and coordinating the support process” (RSA DBE, 2014: Section 24, Stage 2(1)). As noted, the identification of a learner’s needs, together with the degree of support needed, is done taking into consideration both the home and school context. By implication, the learning barriers that have been identified determine the type of support measures that are implemented by all the involved parties. Teachers are expected to identify learning barriers when completing the *Learner Profile*. According to Dreyer (2015), teachers can identify barriers to learning by reflecting on teaching strategies and classroom practises, together with identifying learners’ support needs and possible contextual barriers. Teachers are therefore mainly responsible for organising the support process. However,

[t]he parent/caregiver and the learner (from the age of 12 as far as possible) must be involved throughout in the decision-making process of the *SIAS*. The teacher will be guided by the *SIAS* forms, starting with the completion of the Support Needs Assessment form 1 (*SNA1*) (RSA DBE, 2014: Section 24(2)).

The *SNA1* form captures the areas of concern, and not only requires one to specify a learners’ strengths and weaknesses, but also his/her individual support needs. Based on the information derived from the *SNA 1* form, an *Individual Support Plan* is created for the learner. Then, monthly dates are set to assess the learner’s progress and to review the *ISP* to help determine further interventions. If, upon review, the support provided to the learner proves to be ineffective, the *SBST* is approached to assist in escalating the support provision process. When a learner’s case is referred to the *SBST*, the purpose of the *SNA 2* form is to guide their decision making. According to Section 24, the *SBST* reviews the barriers that have been identified by the teachers, together with the interventions that have been applied. The *SBST* suggests further interventions to strengthen the provision of support. Another review date is set to discuss whether the new support measures have been successful or not. When the *SBST* then come together once

again, they can adjust the support plan and if all the school's efforts still prove to be ineffective and more support is needed, the DBST is approached for further assistance.

The SNA 2 form subsequently provides the SBST members with guidance regarding the learning barriers that have been identified and the applied interventions to help decide a way forward. The SBST of a school is therefore responsible for determining the level and nature of support required to assist a learner to overcome barriers that hinder learning. Strategies are then formulated and executed to reinforce support provision. According to Dreyer (2015), a plan of action is not only developed with input from the SBST and the teacher(s), but also with the parents' assistance. The SBST verifies the assessment of the learner and reviews the impact on the school and teacher support strategies. Whether or not the school's existing resources can meet the learner's needs is discussed, and the learner's eligibility for alternative specialised programs is determined. A review date is set for every term to discuss progress. Upon review, the support plan can be adjusted or, if extensive support is required, the DBST is approached for further assistance. The SNA 3 form is used to guide the DBST to

review the action plan of the teacher and SBST and use the Guidelines for Support, the Table to rate the level of support needed and the Checklist to help determine the decision on how support is to be provided to the learner (RSA DBE, 2014: Section 24(1)(a)).

Based on the information provided in the SNA 3 form, the DBST decides upon the most suitable support package for both the learner and the school. According to Section 24, a support package from the DBST includes planning and budgeting for further support programs. This package involves the allocation of resources and support services to the school and learner. Support services provided by the DBST include teacher and parent training, overseeing support provision processes and utilising the tools provided in the annexures of the *S/AS* policy to assist with the implementation of the decisions.

3.5.2.3 Assessment

The intention of the *S/AS* policy is "to assess the level and extent of support required in schools and in classrooms to optimise learners' participation in the learning process" (RSA DBE, 2014: Section 6(2)). According to the document, assessment is used as a tool to determine the learning barriers experienced by a learner, together with the extent of his/her functionality and participation, but it has no relation to scholastic assessment.

Assessment in this specific context is done to determine the support needs of the learner.

Standardised tests which are culturally fair

can be used as part of the range of strategies used in the assessment process with the aim of informing the teaching and learning process in respect of the nature and level of educational support that needs to be provided to the learner as part of the Individual Support Plan (RSA DBE, 2014: Section 9(5)).

Assessment should be systematic and multi-dimensional in that a variety of tools are used to assess a learner. Different types of assessment are needed to ensure that a holistic view of the learner and the barriers that hinder learning is constructed. Medical, social and therapeutic professionals can also refer learners for assessment if more clarity or confirmation of learning barriers is required.

During the assessment stage of the *S/AS* process, a meeting is held with the SBST to review the intervention strategies of the teacher, to brainstorm the ways in which the teacher's efforts can be strengthened, to review support strategies, and to identify possible community resources. Members of the SBST have to agree on the implementation strategies of the Individual Support Plan (ISP) of the specific learner in question. An ISP is defined in the *S/AS* policy as a "plan designed for learners who need additional support or expanded opportunities, developed by teachers in consultation with the parents and the School-based Support Team" (RSA DBE, 2014: 9). If necessary, the SBST can "request assistance from the DBST to enhance ISPs or support their recommendation for the placement of a learner in a specialised setting" (RSA DBE, 2014: Section 11(b)(3)). Throughout the assessment process, decision-making is a collaborative effort from various stakeholders that influences the individual support plan that the teacher creates for the learner.

Creating an ISP forms part of the assessment stage of the *S/AS* process. An ISP is created for every learner suspected of suffering from learning barriers. The ISP is mostly applicable to teachers, as it guides lesson planning. The expectation exists that teachers should adapt their teaching strategies to ensure that the needs of the learner(s) in question are met. An ISP is therefore a specific support intervention plan created by the teacher, but involves inputs from the learner, the parents and the SBST. As noted by Mfuthwana and Dreyer (2018; *cf.* also RSA DBE, 2014: Section 11), the ISP is implemented at school level, but it can also involve external interventions. At an internal school level, the teacher is responsible for summarising the specific identified barriers to

learning. This summary provides specific support measures that often include adapted assessment strategies, curriculum differentiation, and social, emotional or health support. Throughout the assessment process, the teacher initiates frequent consultations with the learner and his/her parent(s). In the event that the teacher's support provision strategies prove to be insufficient, the teacher's concerns will be reported and referred to the SBST. The SBST is then responsible for collaboratively reviewing and strengthening the implemented strategies. If additional support is still required, the SBST will consult with the DBST. Planning for external interventions involves members of the DBST to review the intervention strategies of the teachers and the SBST, and to make resources available for ensuring the necessary support. Support provided to a learner can range from the DBST providing learners with high levels of support with assistive devices, to placing them in resource centres or special needs schools.

3.5.2.4 Support

According to Section 14, after a learner has been screened and the learning barriers identified and assessed, specific support measures for the specific learner is determined. Providing learners with support is a key component of the *S/IAS* policy, as it is regarded as the solution for overcoming learning barriers while optimising a learner's learning experience. The department explains that “[p]roviding support to individuals is only one way of making learning contexts and lessons accessible to all learners (RSA DBE, 2014: Section 8(2))”. When deciding the way(s) forward regarding support provision, the nature as well as the extent of the support required first need to be determined. This is done by assessing

- a) The existing resources or support available to the learner and the school
- b) The additional support that is still required
- c) What is available within the province or district that could reasonably be made available at school level through a range of means (RSA DBE, 2014: Section (8)(11)).

The provided support depends on the resources available at the school and resources made available to the school by the district. According to the *S/IAS* policy, support is comprised of all school activities that have the ability to grow its capacity to address diversity, and involves various stakeholders. Support can be optimised “when schools review their culture, policies and practices in terms of the extent to which they are inclusive centres of learning, care and support (RSA DBE, 2014: Section 8(3))”. It is further

stipulated that the support “must focus broadly on the learning and teaching process by identifying and addressing learner, teacher and school needs” (RSA DBE, 2014: Section 8(4)). According to the support guidelines of the policy, a support package must be developed after the screening, identification and assessment of learning barriers. Such a support package can “consist of a range of additional support provisions that may not be equal in respect of their level of intensity” (RSA DBE, 2014: Section 8(5)). The support package is uniquely designed based on the intensity of support which varies between low, moderate and high.

Low levels of support provision are mostly

preventative and pro-active, and cover all the support provisions in generally applicable departmental programme policies, line budgets, and norms and standards for public schools (RSA DBE, 2014: Section 14(3)).

When mainstream schools receive low levels of support, it means that interventions are “accommodated within the school’s budget and regular organisation of the school/classroom” (RSA DBE, 2014: Section 15(1)). Providing a school with low levels of support aims to prevent future problems with policies, budgets and the overall norms and standards of the school. When comparing special schools and/or full-service schools to mainstream schools, it is clear that learners with learning barriers in mainstream schools receive less support than those in specialised educational settings (Muthukrishna *et al.*, 2016).

Moderate levels of support are “provided once-off, on a medium-frequency, intermittent or short-term basis, or through a loan system” (RSA DBE, 2014: Section 14(4)). Moderate level support is generally temporarily provided as a once-off or short-term intervention in ordinary schools or classrooms. It is further stipulated in Section 14, that full-service schools are moderately supported by the DBE. As noted by Muthukrishna *et al.* (2016), learners with moderate physical and mental impairments, together with those who experience socio-economic barriers, are well supported in full-service schools, as these have access to more resources and staff. The purpose of FSSs is to optimise learners’ participation in education. In doing so, exclusion will be reduced through support provision. The provision of support should occur irrespective of a learner’s background, culture, disability, gender or race. The purpose of FSSs is therefore to include all learners in education.

3.6 THE *SIAS* POLICY AND THE POLICY FRAMEWORK

The policy framework for inclusive education (*cf.* Table 3.1) constitutes the principles upon which the *SIAS* policy is premised. The *Constitution* enforces the right of every individual to have access to education while promoting equality and non-discrimination to ensure that all learners are included in education. As an act, *NEPA* legislates the right “of every person to basic education” (RSA DoE, 1996c: Section (4)(a)(ii)). Every person is therefore allowed access to educational opportunities. This right coincides with the right “of every person to be protected against unfair discrimination within or by any education department or education institution on any ground whatsoever” (RSA DoE, 1996: Section (4)(a)(i)). In a similar manner, the *SASA* reaffirms the importance of non-discrimination in terms of access to education. The importance of equality and non-discrimination are reflected in the *White Paper 6* which foregrounds the government’s position on inclusive education, especially for learners with learning barriers. Grounded in this policy framework, the *SIAS* policy is aimed at “improving access to quality education for vulnerable learners and those who experience barriers to learning” (RSA DBE, 2014: Section 1(2)). As an essential strategy for transforming education in South Africa, the policy focuses on a comprehensive approach to support a broad spectrum of learning barriers. By implication, the *SIAS* process allows teachers to create support programs that enhance the quality and accessibility of, and access to, education. At school level, both the quality and accessibility of education is mainly dependent on teachers and support staff. The schooling system in South Africa makes provision for different levels of support, and the new support system acknowledges that teachers and parents have an important part to play in decision-making and support processes. Three different types of public schools exist in South Africa, namely *mainstream schools*, *full-service schools* and *special schools*. Each type of school represents a different level of support available to the school and its learners. Different levels of support exist within the education system, and these vary from low to moderate to high levels of support provision (*cf.* 3.5.2.4). Irrespective of the level of support that a school can provide for its learners, all learners who experience barriers to learning must enjoy the same right(s) as their peers, and they cannot be discriminated against based on any grounds.

3.7 SUMMARY

The objective of this chapter was to foreground the policy framework for inclusion together with inclusive education as a background for the positioning of the *SIAS* policy. The documents I analysed to construct the policy framework were the *Constitution* (1996), the

NEPA (1996), *SASA* (1996) and *White Paper 6* (2001). To position the *SIAS* policy within this policy framework, I first provided a contextual orientation and a policy content exposition of the policy. In alignment with the aim of this study (*cf.* 1.3.4), I focused on the *SIAS* process of *screening, identification, assessment* and *support*. I concluded this chapter by positioning the *SIAS* policy within the existing inclusive education policy framework. In the next chapter, I present the findings regarding the experiences in mainstream schools with the implementation of the *SIAS* policy.

CHAPTER 4: EXPERIENCES WITH THE IMPLEMENTATION OF THE *SIAS POLICY*

4.1 INTRODUCTION

In the previous chapter, I undertook a document analysis to present a policy framework for inclusive education, and to position the *SIAS* policy within this framework. Conducting a document analysis provided me with knowledge on the legislature and policies that guide the implementation of inclusive education practices in South Africa. I used this information to construct the schedules for the individual and focus group interviews. The objective of this chapter was to explore the experiences in mainstream schools with the implementation of the *SIAS* policy (2014) (*cf.* 1.3.3). Before I present the findings of my data analysis, I present a brief exposition of the research methodology of the study, the participant selection, steps taken to ensure the integrity of study and information on data generation and analysis.

4.2 RESEARCH METHODOLOGY

Research methodology is considered to be the bridge between one's philosophical standpoint and the methods used to gather data (*cf.* 1.5.1). The research approach influences the participant selection and research methods used to gather data.

4.2.1 Qualitative approach

My study was informed by a qualitative methodology, and my philosophical standpoint was influenced by an interpretivist paradigm. An interpretivist paradigm is guided by the assumption that multiple realities exist within any given situation. According to Merriam (2009), the intention of qualitative researchers is to understand how people interpret their experiences and how they then create their realities. By working with the *SIAS* policy, stakeholders are able to construct their own realities from their personal experience with policy implementation. These realities differ from one individual to another. In order to understand some of the different points of view, I gathered empirical data through semi-structured interviews and focus group interviews. The empirical part of my study therefore aimed to explore the experiences in mainstream schools with the implementation of the *SIAS* policy. The empirical data, together with the information gathered in the previous chapters, enabled me to comment on the participants' experiences when having to screen, identify, assess and support learners who experience barriers to learning. The qualitative nature of this study allowed me to systematically gather information through specific

methods in order to ask questions applicable to individual experiences with regard to the *SIAS* process (*cf.* Merriam, 2009). Consequently, I made use of interviews to create a space for the participants to reflect on their individual experiences with aspects of the *SIAS* policy. The participants' responses provided me with non-generalisable answers and contributed to an in-depth understanding of their experiences with policy implementation (*cf.* Nieuwenhuis, 2016). By implication, the use of a qualitative methodology enabled me to gain a better understanding of the experiences of the participants in the context in which they work.

4.2.1.1 Selection of participants

I used a purposive participant selection method to select the participants for this study. Various criteria were used to select participants who would be best positioned to provide information regarding the implementation of the *SIAS* policy in mainstream schools (*cf.* 1.5.3). Members of the SBST of three primary schools, one from each quintile level 3 to 5, took part in the focus group interviews. In order to protect the identity of the schools, I refer to them as School A, B and C respectively. I coupled the schools with the identity of the interviewees from each of the schools, and refer to them as A1, B1 and C1 etc. After the focus group interviews with the SBSTs, the intention was to conduct semi-structured individual interviews with the principals who are responsible for overseeing the particular SBSTs. However, none of the principals were available for an interview due to time constraints, and I was referred to the vice-principals. As the vice-principals are also involved in the management of the school, I considered them knowledgeable on the implementation of the *SIAS* policy and therefore as valuable to my study (*cf.* RSA DoE, 2014: Section 27). In Table 4.1 below, I give an exposition of the participants who contributed towards this study.

Table 4.1: Particulars of the participants

Participant	Quintile level of the school	SBST position	Gender	Teaching experience	Competency required in light of the <i>SIAS</i> policy	Participation
A1	3	Vice-Principal	Female	32 years	To maintain “a total awareness of the administrative procedures across the total range of school activities and functions” (RSA DBE, 2016: Annexure A.6, par.2.2).	Individual interview
A2	3	Head of Department	Female	33 years	To ensure “the effective functioning of the department and to organise relevant/related extra-curricular activities so as to ensure that the subject, learning area or phase and the education of the learners is promoted in a proper manner” (RSA DBE, 2016: Annexure A.5, par.2).	Focus group interview
A3	3	Remedial teacher	Female	30 years	Identifying barriers to learning at “learner, teacher, curriculum and school level” (RSA DBE, 2014: Section 26(7)(b)).	
A4	3	Gr.1 teacher	Female	12 years	Teachers are expected to “apply the <i>SIAS</i> process. The teacher must assume the role of case manager to drive the support process” (RSA DBE, 2014: Section 34(12)).	
B1	4	Vice-Principal	Female	28 years	To maintain “a total awareness of the administrative procedures across the total range of school activities and functions” (RSA DBE, 2016: Annexure A.6, par.2.2).	Individual interview

Participant	Quintile level of the school	SBST position	Gender	Teaching experience	Competency required in light of the <i>SIAS</i> policy	Participation
B2	4	Remedial teacher	Female	26 years	Identifying barriers to learning at “learner, teacher, curriculum and school level” (RSA DBE, 2014: Section 26(7)(b)).	Focus group interview
B3	4	Gr. 5 teacher	Female	21 years	Teachers are expected to “apply the <i>SIAS</i> process. The teacher must assume the role of case manager to drive the support process” (RSA DBE, 2014: Section 34(12)).	
C1	5	Vice-Principal	Female	21 years	To maintain “a total awareness of the administrative procedures across the total range of school activities and functions” (RSA DBE, 2016: Annexure A.6, par.2.2).	Individual interview
C2	5	Head of Department	Female	16 years	To ensure “the effective functioning of the department and to organise relevant/related extra-curricular activities so as to ensure that the subject, learning area or phase and the education of the learners is promoted in a proper manner” (RSA DBE, 2016: Annexure A.5, par.2).	Focus group interview
C3	5	Remedial teacher	Female	11 years	Identifying barriers to learning at “learner, teacher, curriculum and school level” (RSA DBE, 2014: Section 26(7)(b)).	
C4	5	Remedial teacher	Female	37 years		

4.2.2 Integrity of the study

Research integrity refers to one's adherence to ethical principles and to professional standards that are necessary for the responsible practice of research (Shaw & Satalkar, 2018). In order to adhere to the ethical practice of research, it was important to commit to intellectual honesty and to take responsibility for my conduct throughout the research process (*cf.* Shaw & Satalkar, 2018). The ways in which data was generated and analysed in my study reflect various ethical values that enabled the integrity of the study. The ethical considerations applicable to the study and the values they represent are discussed in the sections below.

4.2.2.1 Ethical considerations

Before any empirical data could be gathered, I had to apply for ethical clearance from the ethics committee of the Faculty of Education at the University of the Free State (*cf.* 1.7). After receiving ethical clearance from the ethics committee, I then had to apply for permission from the Free State's Department of Education, as I was working with employees of the Department. When I received a confirmation letter from the Department, I approached the schools where I wished to conduct my research. One of the main objectives of research ethics that I complied with, was to protect the participants in this study from any physical or emotional harm. Before any interview took place, the participants were informed about the aim of the study and the value of their contribution. The participants knew from the onset that their participation is voluntary and that their identities would not be made public. They were also informed that the information that they provided would be kept confidential as it would only be used with the intention of completing the study. The participants who agreed to participate gave written consent (*cf.* Appendix B). The participants were also made aware that they could withdraw at any stage, even after having signed the consent forms. During the interviews I treated the participants respectfully and listened with attention to their opinions. To create a comfortable atmosphere for the participants, I conducted the interviews at the schools where the participants work. All interviews were audio-recorded, stored on a password-protected computer and transcribed by myself.

4.2.2.2 Trustworthiness of the study

The trustworthiness of a study refers to the truth value and the transparency of conduct throughout the study (*cf.* 1.6). Trustworthiness was established in the study by firstly making sure that I adhered to specific ethical considerations (*cf.* 4.2.2.1), and secondly by

taking specific steps to ensure the credibility, dependability, confirmability and transferability of the study. I ensured *credibility* by sharing my academic work with my supervisor on a regular basis, for which I received constructive feedback. The feedback enabled me to draw various conclusions regarding my study. I created an audit trail in the form of a reflective journal in which I kept notes of the entire data generation process, including data recording and analysis. By documenting the research process, I was able to establish *dependability*. By carefully recording the different processes used for attaining the objectives of the different chapters, I provided visible “evidence” which could assist in establishing *confirmability*, and in this way I could enable the consistency and repeatability of the research findings (*cf.* Bowen, 2009). To ensure *transferability*, I provided a detailed description of the participants I selected to participate in the study (*cf.* 1.5.3; 4.2.1.1). In addition, I provided an encompassing description of my research design (*cf.* 1.5.3). The trustworthiness of this study was therefore ensured through the steps I took towards credibility, dependability, conformability and transferability.

4.2.3 Data generation strategies

In order to generate empirical data, I made use of three focus group interviews, which lasted approximately 20 minutes each, and three semi-structured individual interviews of more or less 20 minutes. The focus group interviews were held with two to five members of the schools’ SBST. The focus group interviews were aimed to generate specific data regarding the perceptions and experiences of the participants with the implementation of the *SIAS* policy. Before the interviews commenced, the interviewees were asked if they preferred the interviews to be conducted in English or Afrikaans. This was important because I wanted to ensure that the participants fully understood the questions and were able to comfortably communicate their points of view. I translated all the Afrikaans data into English.

For the focus group interviews, I used an interview schedule (*cf.* Appendix C) which was informed by my own understanding of inclusive education (*cf.* Chapter 2) and specific themes associated with the *SIAS* policy (*cf.* Chapter 3). For the focus group interviews, it was firstly important to establish the barriers to learning that are most common amongst the schools’ learners (*cf.* Question 1). I wanted to determine whether or not the type of barriers to learning influenced the *SIAS* process in any way. The SBST members’ knowledge of the *SIAS* policy was explored by means of specific questions regarding the screening, identification, assessment and support procedures used at the school (*cf.*

Questions 2, 3 and 4). As the SNA forms form the basis for the administration of the *SIAS* process, I wanted to know about the usability of the forms (*cf.* Question 5). The participants had the opportunity to comment on the positives and negatives when working with the forms, and also on how the forms could be improved. I then asked the participants about the challenges they experience with the implementation of the *SIAS* policy, and what resources are required to address those challenges (*cf.* Questions 6 & 7). The intention with these questions was to gain a better understanding of the contextual background of the school. Chapter 2 indicated that policies need be context-appropriate in order to be implemented successfully (*cf.* 2.3). Asking questions relating to the contextual background of the school was therefore crucial in determining the ways in which the *SIAS* policy is implemented in the different schools. In order for me to gather more detailed information from the participants, I made use of probing during the various focus group interviews.

To gain an understanding of the vice-principals' personal experiences with the implementation of the *SIAS* policy, I conducted semi-structured interviews. I used an interview schedule (*cf.* Appendix C) as a basic guideline, but I had to probe the participants for additional information, or when I needed them to elaborate on their answers (*cf.* Creswell, 2012; McLeod, 2014). In order to further understand the contextual background of the different schools, I wanted to know how long each school has been implementing the *SIAS* policy, and the most common barriers to learning experienced by the learners (*cf.* Questions 1 & 2). This was not only asked to reaffirm the barriers identified by the SBST members, but also to take note of learning barriers that SBST members might not have mentioned. Most of the questions asked throughout the interviews were to determine the vice-principals' knowledge of the *SIAS* policy (*cf.* Questions 3 - 8). I enquired about the aim of the *SIAS* policy, and also wanted to know if the staff had received any form of training from the school or the DBE with regards to its implementation (*cf.* Question 4). I specifically asked this question as it aligns with questions asked during the focus group interviews about SBST members' understanding of the policy. I proceeded to ask about the steps that are followed when a learner is suspected of experiencing barriers to learning (*cf.* Question 5). I specifically asked this question as I wanted to determine if there was a correlation between the answers of the vice-principals and that of the SBST members. As primary schools include the Foundation and Intermediate phases, I also wanted to know if the steps taken for implementation were the same for both phases (*cf.* Question 6). Lastly, I was interested in exploring the

participants' experience with the policy from a managerial point of view (cf. Questions 9 – 12). I specifically asked questions relating to the availability of resources, the overall experience with policy implementation, and the value of the policy for learners and staff. I worked with different quintile schools, and as a school's quintile is determined by the financial contribution of the parents, I thought it would be interesting to explore the vice-principals' perceptions on the influence of the schools' resources on any of the *SIAS* components (cf. 1.5.3). These questions helped me to gain an understanding of the vice-principals' general perceptions of the policy.

Using two data sets generated from the focus group interviews and the semi-structured individual interviews, enabled me to consider the opinions of those who work directly with the *SIAS* policy, and those who only oversee the implementation of the policy. In doing so, the differences and similarities of the participants' experiences could be explored and discussed.

4.2.3.1 Data analysis and interpretation

My entire study was premised on the ontological assumption that multiple social constructed realities exist (cf. 1.4). I subsequently premised the analysis of the data on the understanding that the participants give meaning to their own experiences in a subjective manner. As I was interested in gaining an understanding of how the participants give meaning to their own experiences, I acknowledged their differential experiences regarding the implementation of the *SIAS* policy. The aim of my data analysis and interpretation of the data was not to generalise their experiences as representative of teachers involved in the *SIAS* process all mainstream schools. Rather, by taking cognisance of their inter-subjective meaning-making of their experiences, I tried to gain an understanding of their experiences. In order to analyse the generated data and to gain insight into their experiences, I made use of thematic analysis (cf. 1.5.4). Thematic analysis enabled me to pinpoint themes within the data. Empirical data was first transcribed from the audio recordings and placed in an Excel table. The table enabled me to read each of the questions together with the responses of the participants in a horizontal manner. By doing this, different themes emerged from the participants' answers, which I colour coded. Similar themes were then grouped together to help with the organisation of the data. Because I conducted focus group interviews and semi-structured individual interviews, two separate datasets were compiled, coded and analysed. To make sense of the empirical data, I had to draw on information obtained in the literature review (cf. Chapter 2) and the

document analysis (*cf.* Chapter 3). As the objective of Chapter 2 was to unpack how inclusive education is conceptualised on an international level and contextualised in South Africa (*cf.* 1.3.1), I had to draw on my understanding of inclusive education and inclusive education practises. In Chapter 3, I foregrounded the South African policy framework for inclusive education and positioned the *SIAS* policy within this framework (*cf.* 1.3.2). Consequently, the knowledge that I acquired from these chapters assisted me to make sense of the findings of the study. Informed by interpretivism, I was able to make sense of the multiple realities in which the participants engage with and implement the *SIAS* policy.

4.3 FINDINGS AND DISCUSSION

In this section, I present the findings of the study. In order to not create a distance between the findings and the discussion thereof, I discuss the findings as I present them in accordance with the themes that arose from the data analysis. As mentioned in the previous section, my discussion was informed by my understanding of inclusive education and by the document analysis of the *SIAS* policy. In order to distinguish between the responses from the SBST members and the vice-principals, and to give authenticity to their voices, verbatim quotes from the SBST members who participated in the focus group interviews are presented in **blue**, and quotes from the vice-principals in **red**. It was important to distinguish between the two different datasets to indicate the ways in which the answers differed or coincided, hence my decision to work in color. In the subsequent sections I present all the quotations in English, but the original Afrikaans quotations with the English translations are available in Appendix D. The findings are presented in terms of the followings themes that emerged from the data analysis: *perceptions regarding the SIAS process, challenges with the implementation of the SIAS policy and recommendation for an improved policy implementation.*

4.3.1 The *SIAS* process

In Chapter 3 (*cf.* Section 3.5.2), I indicated that the *SIAS* process is primarily aimed at assessing the level and extent of support required in classrooms to maximise learner participation in learning. The organising principles of the *SIAS* process involve the screening, identification, assessment and support of learners who are suspected of experiencing barriers to learning (*cf.* Sections 3.5.2.1 – 3.5.2.4). The *SIAS* process reflects the main principles of the *White Paper 6*, and by implication, highlights the importance of providing support for a full range of learning needs in order to overcome barriers that prevent learners from reaching their full potential. Although the components of the *SIAS*

process are integrated with one another, I consider the findings regarding these components separately as each stage consists of different implementation strategies aimed at different goals.

4.3.1.1 Screening

Screening is the first component of the *SIAS* process for which the teacher is responsible. Class teachers or register teachers have to screen a learner when he or she is admitted to a new school, or at the beginning of a new phase (*cf.* 3.5.2.1). To screen a learner means to take note of and document all relevant information in the learner's *Learner Profile*. The learner's register teacher is responsible for updating the profile. As indicated, the document contains medical information about the learner and also personal information about the learner and his/her parents (*cf.* 3.5.2.1). In order to ensure that no information is lacking in the *Learner Profile*, the DBE urges teachers to include all year-end school reports and reports from outside professionals and teachers who work with the learner on a regular basis.

Compiling a profile document involves different ways in which teachers gather learner information throughout the *SIAS* process. Screening and identification by the teachers seems to be an integrated process. Teachers gather information about learners by observing them in the classroom. A3, a remedial teacher who is qualified to identify barriers to learning, explains that “when we screen a child, we basically observe them more closely”. I asked the focus group participants what happens when learners are observed more closely and A2, who is also the Head of the Department, replied: “teachers start to focus on the little things that the children do ... when the teachers see a problem with a child, they come to me and I give them the forms to complete”. In addition to observation, which seems to be one of the main tools used for screening, the participants also indicated learners' marks as an indication of potential barriers to learning:

- A4: “marks are also used to determine who needs possible interventions”.
- C2: “when the children do tests and assessment tasks, the teacher notices if there is a problem”.
- B3: “I look at the marks of the children. Say for instance the child fails at the end of the term then I report them to the remedial teacher”.

Teachers use both observation and the results of scholastic assessments to assist them in the screening of learners. B3 specifically indicated that she uses learners' end-of term marks as a benchmark to help identify learners at risk of experiencing learning barriers.

Although teachers use scholastic performance as a means to screen learners, it should be noted that the *SIAS* policy clearly states that when the level of support is determined, standardised tests are used rather than scholastic assessment (*cf.* 3.5.2.3).

Teachers work closely with their learners on a daily basis and their experiences with the screening of learners allude strongly to the learner in the classroom context. The vice-principals' experiences seem to be more distant from the classroom context, albeit aligned with policy requirements and sympathetic towards the teachers who have to do the screening. Screening involves the gathering of information from various sources (*cf.* 3.5.2.1), and in this regard B1 noted that “it is sometimes difficult [for teachers] because parents do not always complete the forms in full or some documents are outstanding”. Completing learners' documents is dependent on information provided by parents and if they do not complete the forms in full and do not provide copies of the learners' *Road to Health Booklet*, the teacher cannot fully complete the *Learner Profile* and/or the SNA 1 form. Incomplete information can lead to the prolonging of learner referral for further intervention and support to the SBST and DBST (*cf.* 3.5.2.1). In addition to frustration with incomplete information, C1 affirms that the process “takes time, because the teacher must first do didactics and give extra classes and if there is still no progress, they have to refer it to the School Based Support Team”. Teachers in mainstream schools are expected to provide low or moderate levels of support intervention before they report a learner to the SBST (*cf.* 3.5.2.4). A1 also gives some insight into the time consuming nature of the *SIAS* process:

teachers usually do didactics for about three months or one term, if no progress it has to be reported to the School Based Support Team who then decides what to do next. Usually the next step is to send them to our remedial teacher for assessment.

The findings revealed that teachers rely on observation and learners' marks for screening and to update learners' *Learner Profile*. The vice-principals, due to their managerial position, consider the screening stage as integrated with other stages and not as a mere initial information gathering and documenting stage.

4.3.1.2 Identification

There are two stages regarding identification within the *SIAS* process, namely after the teacher's initial screening of a learner with a potential barrier to learning (*cf.* 3.5.2.1) and when the learner is referred by the teacher for further testing (*cf.* 3.5.2.2).

The understanding that teachers remain primarily responsible for the identification of learners at risk seems to be shared by the participants. For B2, the assumed role makes sense “because we work with the children every day, it is easy for us to determine when something is wrong ... you can easily see it”. While B2 referred to the ease with which she is able to identify learner difficulties, A4 indicated that “teachers identify children who struggle by observing them in class”. These participants confirm the extent to which teachers use their observation skills as a tool to screen (*cf.* 4.3.1.2) and identify learners who experience difficulties in class. A4 elaborated on what she does when she sees a child struggling in class: “I start with didactics and when that doesn't work, I go to our HoD and she gives me forms to fill in”. In addition to their everyday responsibilities, teachers have to adapt their classroom activities to accommodate learners who struggle with learning. A4 recalled an example of a specific learner she suspected could not see properly on the board: “I moved the learner to the front of the class, but then I realised that he also put his head very close to his book when he was reading, so his sight was not good”. The teacher continued to explain that she referred the learner to the remedial teacher who recommended short and long term interventions. The teacher further stated that this specific learner and the barrier(s) he was experiencing was identified more than a year ago. “I contacted the child's mother and told her I thought the child needed to maybe see a specialist, but still nothing happened”. If teachers are therefore able to successfully identify learners with barriers to learning and/or the specific barriers themselves, it is of no use if further action is not taken to support learners with special educational needs (*cf.* 2.4).

Even though teachers are best positioned to observe their learners in their classrooms, B3 alluded to the problem that “we cannot reach them all because our classes are too big. So it is usually only the severe cases that we pick up and refer”. If teachers are only able to identify learners with severe learning barriers, learners who require low or moderate levels of support can easily be overlooked. Learners in need of low or moderate levels of support are mainly found in mainstream schools and no learner should be overlooked during the screening process just because their needs are regarded as less important than the needs

of their peers. If learners are overlooked, they are excluded from the Ministry's commitment to provide educational opportunities "in particular for those learners who experience or have experienced barriers to learning and development" (RSA DoE, 2001: Section 1.1.5). Screening learners when they start at a new school and at the beginning of a new phase is therefore crucial to help with the identification of as many learners as possible in need of extra support (*cf.* 3.5.2.1).

As mentioned, identifying barriers to learning is not only dependent on teacher observation, but can also be derived from existing data sources, such as the *Learner Profile* and the SNAs (*cf.* 3.5.2.2). Once a learner has been identified by the teacher as experiencing possible barriers to learning, that teacher becomes responsible for overseeing the administration involving the specific learner's case. Administrating the *SIAS* process implies that the teacher, usually the register teacher, has to update the *Learner Profile* and SNA 1 on a regular basis (*cf.* 3.5.2.1). The role of teachers as case managers is summarised by A1:

the teacher who identifies a child, has to complete the SNA 1, which is filled in quite broadly with what the teacher already knows about the child ... teachers must fill in a lot of details about the child. And we don't always have all the child's information.

As noted, teachers cannot always give detailed information because some parents provide the school with incomplete information when the child is admitted to the school (*cf.* 4.3.1.1). In addition to their struggle with incomplete information, the SNA 1 form "is a difficult document to fill in because teachers can only answer some of the questions on their own, the rest of the answers must be found in other documents" (B1). The difficulty regarding the completion the SNA 1 form seems to also relate to the problem of incomplete information. In the SNA 1 form, learner strengths and weaknesses are identified and documented, along with other personal and medical information, which is not always known by the teacher. By implication, teachers are not only responsible for documenting information, but they must search for information as well (*cf.* 3.5.2.1). The administration surrounding the identification of learners seems to be a problem as "teachers are disheartened with all the paperwork, so the forms are not fully completed or they don't want to do it at all" (C2). It can be anticipated that if the process is complicated due to the amount of paperwork amidst an already heavy workload, teachers might shy away from identifying learners with barriers to learning. If teachers do not identify learners who experience barriers to learning, such learners will not receive the support that they

need. Inclusion can therefore also be hindered by attitudinal barriers that exist among teachers (*cf.* 2.6). However, if and when teachers identify learners who might have learning barriers, the learning barriers need to be assessed.

4.3.1.3 Assessment

The assessment component of the *SIAS* process does not refer to scholastic assessment. In this instance assessment entails assessing for the sake of identifying barriers to learning and the level of functioning of the learner. Specific support needs and interventions are then determined, based on the results of the completed assessment(s) (*cf.* 3.5.2.3). The aim of the assessment is therefore to guide teaching and learning processes relating to learners with special educational needs. Any multi-dimensional tests or tests that are systematic in nature, or standardised tests, can be used to assess learning barriers (*cf.* 3.5.2.3). The three schools that were part of this study had at least one remedial teacher, irrespective of the quintile level of the school. All of the remedial teachers formed part of the focus group interviews because they are mainly responsible for assessing and identifying learning barriers and have to recommend support strategies (*cf.* Table 4.1). Due to their expertise, remedial teachers are part of the SBST. B2 explained that “if the teachers are worried about a child, they [the teachers] refer them [the children] to me and then we start with the process”. The screening and identification stages start with the teacher, and as noted by B2, they must provide evidence of why a specific child was identified: “[t]eachers usually come to me with a piece of writing for example where the b’s and d’s are the wrong way around, then you know there is a problem and the child must be tested”. Teachers’ role in the screening and identification process is imperative as they guide remedial teachers regarding the barriers they should assess, and also in the type of assessment required. According to C4, various types of tests can be done to determine learning barriers: “[w]e do the Milner test with the older children. It is a spelling test. And then the Bellard test for the little ones that includes maths”. The determining factor of which one of the two tests are used seems to be the learners’ age. At School 3, A3 uses the UTC-test, which is “a standard test that the Department suggested we use. It tests word recognition, spelling and reading speed”. The UCT-test is also used to assess learners’ language skills. B2 does “a screen test ... It is a test that focuses specifically on identifying reading problems”. She further states: “we have been doing the same test for years”. This implies that other tests have not been explored in recent years. The types of tests that remedial teachers use are not prescribed and they use their own discretion to decide which tests are most applicable for assessing learners

(*cf.* 3.5.2.3). It seems, however, that the tests used by the participants center on assessing learners' language abilities. C3 explained:

[y]ou must remember that effective learning cannot take place if language skills are not in place. If a child struggles to, for example, read or write he is going to struggle to learn. And language is the basis for any subject, so if there is a problem with language structures, he is going to struggle and continue to struggle until the problem is solved.

Assessment is aimed at determining the way forward for both the learner and the teacher. A1 aptly indicated that “[t]he remedial teacher uses test results to make a diagnosis and then she [the remedial teacher] works with the teacher to decide how to help the child”. In alignment with the *SIAS* process, the participants confirmed the pertinent role played by the remedial teacher in not only assessing the learners to determine barriers to learning, but in suggesting applicable support strategies to teachers. According to stage 2 of the *SIAS* protocol, an individual support plan, which is reviewed once a term, is formulated after a learner has been assessed, to ensure that his or her support needs are met (*cf.* 3.5.2.3).

4.3.1.4 Support

After learning barriers have been identified and assessed, an individual support package is created for implementation by different role players (*cf.* 3.5.2.2). According to the *SIAS* policy, teachers are primarily responsible for creating interventions to minimise or even eliminate barriers to learning. However, in order to address the impact of such barriers on the learning process, a support program needs to be specifically created and implemented according to each learner's situation (*cf.* 3.5.2.3). When asked what the vice-principals thought the purpose of the *SIAS* policy was, all of them indicated that it was to support learners who experience difficulties in school. A1 said: “I would say its purpose is to identify children that struggle and to try to find them help”. In A1's opinion, the aim of the *SIAS* policy is to identify learners who have difficulties in school and find solutions in order to help them. This sentiment is shared by C1, who stated that “I think it is mainly to focus on and support children that need help”. C1 reaffirmed the importance of support for learners in need of extra assistance. In addition, all of the vice-principals indicated that remedial teachers are their schools' greatest resources for support to learners in need of extra assistance. B1 gave a lengthy explanation of the support provided at her school:

teachers usually adapt their teaching methods to see if the child does not improve. If the child still does not improve, he or she is then referred to our remedial teacher for testing. The remedial teacher then assesses the child and the results of the assessment are then presented to the parents and the teachers that work with the child. The remedial teacher makes recommendations with regard to what the teacher can do in class to help the child. The teachers are then responsible for adapting the classroom practises to accommodate the child.

I gathered from B1's response that there has to be collaboration between remedial teachers and the regular teaching staff to ensure that a learner is supported. This collaboration is also implied by A1, who referenced a regular strategy suggested by the remedial teacher:

... extra time. Teachers can give them a bit longer to complete formal assessments and tests and they can read to them. But, reading to them one by one is difficult because there are so many other children in the classes.

While the vice-principal alluded to the problem of class size, the granting of extra time as a solution to a problem seems to be quite a general solution, and contradictory to the support provision strategies stipulated in Section 8 of the *SIAS policy*. The policy requires individualised support packages based on the intensity of the support needed by the learner (*cf.* 3.5.2.4). Although the importance of remedial teachers at the school has been highlighted by the vice-principals, each school has a unique set of circumstances, which seems to impact on the provision of effective support. C1 indicated that “learners get therapy from our remedial teachers once a week”. Upon elaboration, C1 explained that because the school has only two remedial teachers, “the grade 4 - 7's don't receive remedial teaching. There are too many children that need help, so you have to decide who needs it the most”. Although learners in higher grades with severe learning difficulties receive therapy, she reasoned that “the earlier a problem is addressed the better because then your chance of fixing the problem is better”. The literature also supports the notion that it is crucial for optimal development and the resolving of learning barriers to intervene when learners are still young (*cf.* 2.6). Early intervention is thus preferable for addressing barriers to learning, but it does not mean that older learners must be neglected, or even excluded from remedial teaching.

Although remedial teachers are responsible for making recommendations on support strategies for implementation in the classroom, teachers can still use their own discretion

to determine which support measures they want to implement in their classrooms. In this regard, A2 mentioned that “[w]hen we now know that a child has learning problems, we need to do didactics in class”. The participant explained didactics as “the day’s work that they [the teachers] do again to repeat the work with less children. Like a comprehension test will be done again with the children that maybe did not understand it the first time”. Didactics seems to be done on a daily basis, and according to the *SIAS* policy it must be done for a few months. If there is still little or no progress, the SNA 1 form must be completed for further referral (*cf.* 3.5.2.1). C1 confirmed this procedure:

if a child after receiving didactics, he [sic] is referred to the SBST ... [the SBST] look at what the teacher did to help the learner in the class, after which we make recommendations regarding possible changes that can be implemented. It is indicated on the SNA 2.

Vice-principal C1’s understanding of the *SIAS* process is aligned with the directive of the *SIAS* policy (*cf.* 3.5.2.4) in that

[a]fter the SNA 2 form is completed by the SBST, there is another waiting period so that the strategies can be implemented by the teacher(s). If the suggested support strategies still do not seem to help ... the SBST meets again to discuss the learner in question. If the SBST determines that all the school’s available resources are depleted ... the DBST is contacted.

B3 also confirmed the process: “when we helped a child and there is no or not enough progress, the DBST is approached for help”. From the findings it appears that learner progress is constantly monitored, upon which further intervention is pursued. When the *SIAS* process reaches a stage where the DBST is approached, the school has depleted all its resources and is dependent on the DBST’s recommendations (*cf.* 3.5.2.4).

The findings revealed that there is a special class for learners with barriers to learning at two of the participating schools. B1 was of the opinion that one of the school’s most valuable resources is “[o]ur special class. But our special class only goes up to grade 3 and then they go back to mainstream because there is no special class for grades 4, 5 and 6”. The special class consists of learners ranging from six to ten years with a variety of special needs. For B1, the return of these learners to the regular mainstream classes from grade 4 onwards is highly problematic because “then it is chaos and the academic problems become even bigger because they [the learners] can’t cope with the work”. According to the *SIAS* policy, mainstream classrooms only provide learners with low to moderate levels of support, while learners in the special class are those who cannot cope

in mainstream classrooms and receive high levels of support (*cf.* 3.5.2.4). A1 indicated that they have “one SO [special education] class with 21 grade 1 to grade 5 learners, all in one class. It cannot accommodate all the children that struggle, so the majority of them are still in mainstream”. By implication, a large number of learners with special needs are still in mainstream classrooms and might not receive the necessary high-level support that they require.

The findings pertaining to the implementation of the *S/AS* process indicated that the initial stage of the process, which is the screening stage, mainly involves learner observation (*cf.* 4.3.1.1). Through observation, teachers are able to identify not only learners who experience learning barriers, but also the suspected learning barrier(s) (*cf.* 4.3.1.2). Teacher suspicions are proven or waylaid by assessing the learner in question. This assessment refers to the determining of learning barriers. In all the participating schools, assessment was mainly done by the remedial teacher(s) (*cf.* 4.3.1.3). The results of the assessment direct the support strategies that need to be implemented. The steps taken to implement support measures within the participating schools were highlighted, and included providing learners with didactics and therapy in the form of remedial teaching, or placing them in the special class if the school has one (*cf.* 4.3.1.4). It seems, however, that it is mostly younger learners or those with severe learning barriers who are able to access therapy or special classes, and the need for additional special classes was emphasised (*cf.* 4.3.3). It is important to note that all of the participating schools are considered full-service schools and should be able to cater for the full range of learning needs, based on the DBE’s expectation (*cf.* 2.6). The functioning of the *S/AS* process was discussed in this section, but as with the implementation of process, challenges were foregrounded during the focus group interviews.

4.3.2 Challenges

The findings revealed that the participants experience various challenges within their teaching environments that often hinder the *S/AS* process and the implementation of the *S/AS* policy. These challenges pertain to insufficient school readiness, lack of parental involvement, drawn-out processes, teachers’ attitudes and inadequate resources. In the following section, I consider these challenges as factors that hamper the implementation of the *S/AS* process, and by implication, the *S/AS* policy.

4.3.2.1 Insufficient school readiness

Insufficient school readiness was a common theme that emerged during the focus group discussions. Although insufficient school readiness *per se*, cannot hamper the implementation of the *SIAS* process, the participants highlighted it as one of the factors that initiates the process. Children are expected to be ready for school before they start with formal schooling, but financial constraints due to unemployment is often the reason for parents not sending their children to pre-primary schools: “sending your child to a crèche is a lot more expensive than sending them to school, so the parents keep them [the children] at home until they go to grade R” (A2). This explanation is plausible as School A is a quintile level 3 school, which implies that due to the inability of the majority of the parents to contribute to school fees, the school relies on financial support from the DBE (*cf.* 1.5.3). Even though parents are expected to enrol their children in pre-school before they start with grade R, attendance of formal schooling before the age of six or grade 1, whichever comes first, is not legally enforced (RSA DoE, 1996b). In some other countries, like Lesotho, parents are obligated to enrol their children in a pre-primary school for three years before they can attend primary school (*cf.* 2.5.4).

The findings revealed that children who enter formal schooling and are not ready for school, experience various barriers to learning, which, in turn, provide several challenges for the teacher. A4 indicated that children who start grade R “are on a 3 - 4 year old level, because they cannot write, they struggle to form letters and words and it also makes it difficult to teach them to read”. C3 noted that when the children “reach grade R they have physical and perceptual problems and from there it just snowballs, because if this happens, the problems mostly only get bigger”. It seems as if the problem is not necessarily a matter of learners not attending pre-primary schools. In this regard, B2 indicated that the problem sometimes lies with the pre-primary schools that “maybe focus a bit too much on the paper work part of teaching and the development of fine motor skills, rather than play”. An overemphasis on the development of fine motor skills can lead to learners lacking gross motor skills, which they would typically develop through play. C2, a grade 1 teacher at a quintile 5 school, thus a school where parents are in the position to contribute towards school fees, expressed a similar challenge: “[t]hey often do not have the skills they need for school, and not just physical skills, but emotional skills. They struggle to socialise, they cannot cope with all the work and then they become difficult to handle”. The participants subsequently ascribed many of the challenges learners experience at school to insufficient development of physical and emotional skills, which

often leads to behavioural problems. Regardless of the differences in quintile levels between the schools, there seems to be a general consensus that insufficient school readiness can lead to barriers to learning. While teachers start with the *SIAS* process once they detect barriers to learning, the participants identified insufficient school readiness as a contributing factor to barriers to learning.

4.3.2.2 Lack of parental involvement

Members of the SBSTs, together with the vice-principals, were in agreement that a lack of parental involvement is one of the challenges they encounter in the execution of the support component of the *SIAS* process. In particular, the findings foregrounded how a lack of parental involvement often hampers the implementation of support provision strategies. A2 expressed her concerns that “[p]arents don’t do homework with their children in the afternoons and then they expect them to do well in school. It is not just our [the teacher’s] responsibility to see that the children do well”. Teachers are under pressure to manage the *SIAS* process by completing and updating the *Learner Profile*, the SNA forms and the ISP form (cf. 3.5.2.1; 3.5.2.2), and to some extent, they rely on parents for assisting their own children with support strategies at home. B1 provided insight into the possible reasons for lack of parent involvement:

some of our children come out of horrid circumstances where parents abuse alcohol and drugs and are involved in gangs and also some of the children, because they get no support from their parents.

School B is characterised as a quintile level 4 school and although the school depends on funding from the DBE, some parents are able to contribute to the finances of the school (cf. 1.5.3). Parents’ financial position is therefore not the sole determinant of parental involvement, or a lack thereof. The problem of insufficient parental involvement was also foregrounded by C3, who works at a school situated in a middle class community:

we try from our side to support the children and to help when there is a problem, but sometimes there is no support from the parents. They do not support the children or the teachers and that makes our job very difficult.

It seems that a lack of parental support for learners and teachers is one of the most prominent challenges in teachers’ attempts to assist learners who experience difficulties. Vice-principal A1 purported how lack of parental involvement challenges the implementation of the *SIAS* policy: “the Department expects us to use *SIAS* to help the children who struggle, but how are teachers supposed to help them [the learners] if the parents do not cooperate?” The *SIAS* policy highlights the importance of collaborated

efforts between all parties involved to support the learner who is experiencing barriers to learning. Support provision is therefore not only the responsibility of the school or its teachers, but also of parents (*cf.* 3.5.2.4). A1's frustration alludes to the fact that when parents are absent during the support provision process, overcoming barriers to learning becomes even more difficult. The buy-in of all role players is therefore needed to ensure that a learner is fully supported, not only at school, but also at home (RSA DBE, 2014). C1 also explains that for a managerial position, such as vice principal,

a lot of the time the parents do not have the knowledge on how to help their children. Then we invite them to school to give them strategies on how to help their children, but there isn't always a lot of interest from their side.

Parents do not have the expert knowledge that teachers do, and it can be assumed and accepted that they need guidance from teachers in how to assist their children at home. Teachers are willing to assist parents by suggesting implementation strategies that could be applied at home, but parents are not always interested to assist their children. A3 attributed the disinterest of some parents to their perception that "it is only our [teachers] job to help kids who struggle, but they must actually help us help to help their children but they don't". While a lack of school readiness can contribute towards learners experiencing barriers to learner (*cf.* 4.3.2.1), the little or no support from parents can hamper teachers' attempts to assist learners in dealing with their barriers to learning.

4.3.2.3 Drawn-out processes

The findings revealed that the participants experienced the implementation of the *SIAS* policy process as very time-consuming. A2 expressed her dissatisfaction with the fact that while the teachers are primarily responsible for providing a detailed description of the learner on the various forms,

you don't get people [from the DBE] here easily to evaluate the children. We fill out all the forms and the child gets tested by the remedial teacher. We then refer the child to the SBST and the DBST and then we have to wait for a K-number [clinic number] and then only, do we get a date from them [the DBE] to come assess the child.

A K-number must be indicated on the SNA 2 form, which in turn is required for the application of specific interventions for a learner. By implication, the application process for specialised schooling is placed on hold, while schools await K-numbers. This leads to frustration, and mentioned by A3, a remedial teacher with 30 years of experience: "[g]etting a K-number from the Department is really difficult and takes forever. A few years

ago we could just phone the 'kinderleiding kliniek' [clinic] to get a K-number". The vice-principal from School B, B1, shared similar experiences:

we have been waiting two years for some of the children's K-numbers. And the K-number determines if we will be able to request concession at a later stage. So it takes so long and makes the academic problem worse and bigger.

It seems from the findings that while schools are required to implement the *SIAS* policy, they do not get sufficient support from the DBE to enable the necessary and specialised support practices for learners. The delay in issuing the K-numbers frustrates the process as the number is also required for example, to apply for concession for a learner (*cf.* 3.5.2.4). In this regard, B1 mentioned that "when we apply for concession, it is relatively urgent, but the whole process is slowed down when we have to wait for K-numbers". The delay in granting concession for learners who qualify can subsequently be to the detriment of the learner and his or her performance. It is interesting, however, to note that C2 had a different perception than the colleagues from Schools A and B. Although C2 also alluded to the delay in the issuing of K-numbers, she stated that "we are not dependent on K-numbers anymore, so we get feedback from the Department without it". From the participant's response I gathered that School C does not depend on K-numbers before submitting a learner's case to the DBE, they simply go ahead with such submission and then receive feedback. Since it was indicated that the school receives feedback from the DBE without a K-number, I was curious to know how many learners had been referred to the DBE and how many had been placed in special schools. In response to my question, C4, who has 37 years of experience as a remedial teacher and five years at School C, said: "we had a girl a few years ago that went to School X [a special school]". The referral of only one learner to a special school, especially in the light of C1's comment that younger learners are prioritised and many grade 4 to 7 learners do not receive remedial teaching due to the number of learners (*cf.* 4.3.1.4), poses a question on the extent to which to school has enough support to sufficiently implement the *SIAS* policy.

In addition to frustration with the waiting time for K-numbers, the completion of various aspects of the *SIAS* process is experienced as time-consuming. The process starts with the completion of the SNA forms. In terms of their user-friendliness, A4 voiced that it is "really exhausting and time-consuming, because a lot of the questions are repeated". She (A4) also indicated that "[a] lot of teachers don't want to do the SNAs because of all the extra paperwork, so they don't report the children who struggle". The *SIAS* policy clearly

states that the teacher who initially identifies a learner with learning barriers becomes the case manager responsible for overseeing the learner's case, and should gather all other relevant information (*cf.* 3.5.2.2). However, given the time-consuming nature of additional administrative work, teachers shy away from the paperwork, often despite knowing that certain learners are experiencing challenges. A3 confirmed this state affairs during the focus group interview, and added that “because the forms are so long, there are some teachers that straight out say that they are not going to fill it out. Then it becomes another teacher's problem”. Participants from the other two schools shared a similar experience:

B2: “The SNA forms are very difficult to complete, I think if it was more user-friendly, teachers would fill it out more”.

C2: “we have not been reading in learner information in the last two years, but I know that it is a very time-consuming process”.

B1, a vice-principal, was very sympathetic towards teachers' frustration with the entire process:

it is important to support children who need help ... The paperwork involves a long process that the most teachers try to avoid. It is lots and lots of additional work ... we receive minimum support from above [DBE]. So I can understand the personnel's frustration.

As noted, the amount of paperwork associated with the *SIAS* process and the fact that it is so time-consuming, seem to be some of the reasons for some teachers' reluctance to report learners who experience barriers to learning. C2's comment, that learner information is not regularly captured, implies that *Learner Profiles* are not kept up to date. Incomplete *Learner Profiles* are problematic for the execution of the *SIAS* process, because the information required for the SNA 1 form is taken from the *Learner Profile* (*cf.* 3.5.2.1). Although the participants indicated that parents do not always provide the necessary information (*cf.* 4.3.1.1), the findings revealed that teachers are often reluctant to capture learner information on a regular basis. The *SIAS* process seems to be an elongated endeavour that requires a lot of additional paperwork from teachers who are already required to do didactics with certain learners in their classroom spaces (*cf.* 4.3.1.4).

4.3.2.4 Teachers' attitudes

During the interviews it became apparent that a feeling of cynicism towards the *SIAS* policy existed among the participants, and two specific issues emerged. The first pertained to the idea that learners who experience barriers to learning should be placed in

specialised settings, and the second was that teachers in mainstream schools who do not have the necessary skills to teach learners with special educational needs. Although reference is made to two issues, it should be noted that they are intertwined. The findings revealed that the drawn-out nature of the *S/AS* process feeds into particular attitudes towards various aspects of *S/AS*. Negative attitudes of the interviewees filtered through as they responded to some of the interview questions. A4's frustration was fuelled by a lack of support from the DBE:

... everything looks wonderful on paper, but you don't get people from the Department here easily to come and evaluate the children. Because a psychologist has to come and write a report on what is wrong with the child and what must happen next. Must he go to the special class or a special school or what?

During the focus group discussion, A3 also added to A4's frustration by indicating "that is why us teachers don't want to fill those forms ... some teachers just don't report children anymore ... because it is a schlep to try and get all the child's information and nothing happens". It seems as if teachers feel helpless in their efforts to support the children. A1 complained about the amount of paperwork that "doesn't mean much, because children who struggle are identified and the process is followed, but the majority of them still stay in mainstream. So why do all this paperwork?" A1's frustration seems to be with the lack of referral of learners to specialised schools where their barriers can be addressed. Consequently, the participants from School A felt frustrated with the amount of administrative work required and they seemed to be unwilling to follow the process because their efforts were unwarranted and not reduplicated by the DBE. The dissatisfaction with learners who remain in mainstream education, despite efforts to transfer them to more specialised settings, was shared by B3:

We complete all these forms. We wait 1 - 2 years for feedback from the Department. Then the child already completed the grade. Then you have to do everything again, so the paperwork never stops and the child still sits in mainstream. So why put in all the effort?

The participants' frustrations with the *S/AS* process mainly stemmed from the fact that learners with learning barriers are caught in the middle of an existing gap between policy on paper and policy in practice. In addition, it has been noted that when teachers are compelled to teach learners with special educational needs, it causes them to be cynical of, and reject, transformation policies (*cf.* Oswald & Swart, 2011). I found the line of

thought of the participants from Schools A and B interesting as both of their schools are considered full-service schools. FSS are considered to be capable of accommodating learners with a variety of learning needs (cf. 3.3.3). However, when the number of learners who experience barriers to learning and who find themselves in mainstream schools is considered in light of the number of existing special schools in South Africa, it is highly unlikely that all learners with learning challenges can be accommodated in special schools (cf. 2.6). As such, learners who experience barriers to learning must be accommodated and supported in mainstream schools in order to successfully implement inclusive education (cf. Polat, 2011).

The second issue that emerged from the focus group interviews that contributed toward the teachers' attitudes, was teachers' lack of adequate skills to teach learners with special needs. B1 felt that the *SIAS* policy is of no value "because we are not equipped to work with children who have all these problems. How must we then help them?" In order to illustrate the variety of issues teachers have to deal with, she listed "learning problems, physical problems, behavioural problems, social problems". The wide range of challenges, which teachers in mainstream schools must address, implies an equally wide range of skills required by the teachers. The findings revealed that the participating schools had received training on the *SIAS* policy:

- A1: "There is a *SIAS* workshop during every June/July holiday. We try to send all our new teachers so that they also know how it works".
- B1: "We had a workshop one afternoon".
- C1: "We received training a few years ago".

The responses indicated that there were different perceptions regarding the a frequency of training on *SIAS*. A1 stated that workshops are repeated once a year, while the other two vice-principals seemed to think of the workshops as once-off opportunities. Even if teachers attend once-off training and have a basic idea about the implementation of the policy, specialised training is required to equip teachers with specialised skills for an array of challenges. The need for specialised training was emphasised by C2:

I once contacted the Department so that they can give us a course on issues like ADHD for example, because a few of my colleagues were struggling to manage kids that were very busy in class. But they [DBE] told me, it was the School Based Support Team's responsibility to provide the staff with such courses. I am on the SBST and I did not know that.

It seems that the SBST is required to arrange for workshops to assist with training when a specific need arises. The fact that this participant, who is a member of her school's SBST, was not aware of this responsibility, sheds some light on the poor communication between the DBE and the schools, and perhaps also amongst the members of the SBST. The complexity of the barriers to learning, together with a lack of practical in-service training for teachers, seemed to provoke negativity towards the *SIAS* process, and by implication, towards the *SIAS* policy.

4.3.2.5 Inadequate resources

According to *Inclusive Education South Africa* (2017), inclusive education refers to the capacity of public schools to be able to respond to a variety of learning needs and to provide extra support for vulnerable learners (*cf.* 2.6). To respond to such learning needs, and in alignment with the *SIAS* policy, all mainstream schools, in other words FSS, must be able to accommodate a full range of learning needs in an inclusive education setting (*cf.* 3.3.3). Although all the participating schools were FSS, the participants highlighted a lack of resources as one of the challenges that hamper their response to various learning needs. A2 stated that “there is nothing that shows that we are a full-service school ... [i]f a teacher needs something to help the children in her class, she must buy it herself because the school has no money to do it”. B2 referred to the amount of paperwork, and indicated that:

It is easily 15, 16 pages per child that then needs to go to the Department which must also be photocopied so that we can put the evidence in the child's file. Sometimes I just cannot do it, because if you don't have paper, you don't have paper.

A lack of resources does not only influence the school's ability to promote inclusion, but seems to have an impact on the regular day to day operations of the school. If a school cannot, for example, sustain the number of photocopies needed to compile each learner's profile, then the probability exists that some information might be missing or incomplete. The consequence will be that referrals to the DBE might not be processed, and that the entire *SIAS* process is prolonged (*cf.* 4.3.2.3).

The remedial teachers of the schools referred to the need for more specialised assistance to really function as a FSS. A3 indicated the need for “[t]herapists and more remedial classes, because we can't help all the children that need help. There are a lot of kids that need help”. In her particular case, she sees “20 children at a time and then there are still

children who can benefit from RO [remedial teaching], but we can't help everyone". B2, who is also a remedial teacher, responded in a similar manner:

We need more remedial teachers. We cannot get to all the children, so I only work with children that really struggle. ... the problem is, we need more classrooms and the school is bursting from its seams, so here is physically not enough space.

While the DBE insists that it will be able to achieve full inclusivity by converting ordinary schools into full-service schools (*cf.* 3.3.3), teachers' experiences portray a different reality. A FSS is supposed to be well-resourced in order to address and minimise a range of barriers to learning (*cf.* 3.3.3). It is not feasible for teachers to take financial responsibility for the provision of resources, nor is it conducive to work with a large number of learners at a time.

In addition to the need for more specialised services and more remedial teachers, the lack of equipment was also foregrounded. C2 indicated that at her school, there are "only two computers for 60 of us. If you need to use the computer, you must book it for a specific time slot. So we can actually do with one computer in every class". C3, a remedial teacher added to the discussion by saying "we also need computers for the RO [remedial teaching] classes. There are no computers or internet for us or the kids. It would really help if we could do activities electronically and even the testing would be easier. All the assessments we do are done on paper". Despite being a quintile 5 school where one would assume the school could afford extra equipment, the teachers struggle because there are not enough computers to assist learners with barriers to learning.

From their managerial position, the vice-principals questioned the feasibility of full-service schools, especially in light of insufficient resources at their respective schools.

B1: "We don't have ... enough staff like remedial and SO [special education] teachers ... We need more special education classes ... If we had more special education classes, we might have less discipline problems".

A1: "Our kids come from very poor backgrounds ... Almost everything they need for school must come from the school or the teachers. So we only have money for the basic things".

From the results it became clear that there are two main barriers for schools becoming true FSS. The first is a lack of staff with specialised skills (*cf.* 4.3.2.4), and too few special classes where learners with severe learning difficulties can work with an adapted

curriculum in a specialised setting (*cf.* 4.3.3). While insufficient resources at schools can have a negative impact on inclusion, the vice-principals reaffirmed their scepticism regarding the transformation of their schools into fully inclusive mainstream schools. Although from a school classified as fully inclusive, B1 said “**at this point we don’t receive any of the benefits of it**”. Full-service schools are defined in the *SIAS* policy as ordinary schools that are “strengthened and orientated to address a full range of barriers to learning in an inclusive education setting” (RSA DBE, 2014: 9). It is clear from B1’s response that additional support and resources are required to include all learners in education. A1, the vice-principal of a quintile 3 level school that is totally dependent on the DBE for financial support, indicated that “[**t**]o be fully inclusive you have all the resources and manpower [**sic**] that your school needs, but at our school there is a lot of things that we still need”. Vice-principal C1 voiced her scepticism about the *SIAS* process:

It is never going to work. I feel that we do not have the capacity or the time to do so. ... The classes are too big ... there is not enough resources available for all things you would need to be inclusive. And there is no time in the curriculum to adapt lesson plans for each of the learners.

The findings revealed a number of challenges experienced by teachers regarding the *SIAS* process and the subsequent implementation of the policy. The first challenge pertains to children entering formal schooling without having acquired certain skills that account for their readiness for schooling (*cf.* 4.3.2.1). Due to poor financial circumstances, parents cannot afford to send their children to pre-primary schools. One of the consequences of not being ready for school, is that insufficient skills accumulate into becoming barriers to learning. A lack of parental involvement implies that teachers cannot dependent on parents’ support for the successful implementation of intervention strategies for learners who experience barriers to learning (*cf.* 4.3.2.2). Teachers also seem to be disheartened with the time-consuming nature of the *SIAS* process (*cf.* 4.3.2.3). The amount of time that the steps in the stages of the *SIAS* process take to complete contributes towards teachers developing a negative attitude towards the process (*cf.* 4.3.2.4). Negativity towards the *SIAS* process seems to be fueled mainly by the additional time and effort required from teachers, and insufficient support from the DBE. Insufficient support from the DBE seems to feed into the schools’ frustrations regarding inadequate resources. While all three schools are classified as FSS, the participants indicated that their respective schools do not have the required resources to accommodate a full range of learning needs (*cf.* 4.3.2.5). All three vice-principals were in agreement that although

their respective schools are perceived as FSS, which should be able to cater for a wide range of barriers to learning, they have not been transformed into being fully inclusive. Richard (2014) and Mitchell (2017) found that when all learners are mainstreamed, regardless of their special needs, obtaining inclusion can be problematic if education policies do not meet local demands and priorities (*cf.* 2.3). This observation is significant in light of the participants' experiences with the implementation of the *SIAS* policy. The findings revealed that policy implementation is hindered by a variety of challenges, such as insufficient school readiness, a lack of parental involvement, drawn-out processes, teachers' negative attitudes and inadequate resources. By implication, if the implementation of the policy is hampered, the right of all children to be included in a supportive educational environment is violated.

4.3.3 Recommendations towards improved policy implementation

At various points during the interviews, the participants shared suggestions on how the implementation of the *SIAS* process could be made more effective. On the one hand, their suggestions were based on their experience with the *SIAS* process, and on the other hand, the suggestions gave some insight into the experiences of mainstream schools with policy implementation.

According to the findings, the participants are frustrated by the time-consuming nature of the *SIAS* process (*cf.* 4.3.2.3). In line with this frustration, A4 referred to the repetitive nature of the SNA and suggested that since

it is difficult for the teachers to answer some of those questions, because they [the teachers] have to explain everything they do and how they experience the child in class ... maybe the language or maths teachers who have the children in class can help fill in the forms, it will also be easier.

The completion of forms relies on the register teachers' knowledge of and experience with the learner(s) in class (*cf.* 3.5.2.3). The register teacher does not necessarily teach languages and/or mathematics, yet he or she has to assess the learner's language and mathematical abilities to identify learning barriers. It is plausible that the language and mathematics teachers might have more accurate knowledge of the learner(s) in question than the register teacher. On a more practical level, regarding the usability of the SNA, C3 suggested that "if the SNAs were naughts and crosses and answers could just be ticked off then more teachers would do it". Teachers' frustration with the process is not necessarily about having to identify learners with barriers to learning, but rather with the

extra administration due to the detailed information required from them to set the *SIAS* process into motion. By implication, the suggestion foregrounds the predicament of teachers shying away from the extra administrative work, which in turn might imply that many children do not receive the additional support they need (*cf.* 4.3.2.3). The participants subsequently suggested the streamlining of the SNA forms.

Suggestions were also made about the need for teacher training on the implementation of the *SIAS* policy. C2, for example, made the comment that “the majority of people do not have the knowledge to implement inclusion”. B1 lamented that “we are a full-service school, but we don’t receive any training in teaching children with special needs”. While the participant foregrounded the need for training, she also reflected on the insufficient once-off training workshop “in 2015 and they [the DBE] basically just explained what the policy was about ... they didn’t give us practical ways in which teachers can support learners who struggle in their classes”.

B2 confirmed that

even though we did receive training on the policy, there are still personnel that come ask how the different forms should be completed. We get a lot of new teachers who didn’t get the training we got in 2015, so they don’t always know what to do.

Although the findings indicated that teachers often shy away from the *SIAS* process due to the time-consuming nature of the forms they need to complete (*cf.* 4.3.2.3), it is also possible that the uncertainty resulting from insufficient or no training can impact on teachers’ willingness to accommodate learners’ special educational needs in their classroom spaces. B1 mentioned that “[t]eachers try to adapt their teaching methods, but we are surely supposed to receive training from the Department on specific ways in which we should help these children”. A FSS means that any child who has special educational needs can be admitted to the school and must receive quality education (*cf.* 3.3.3). However, in the absence of clear and distinct practical guidelines, teachers can feel overwhelmed by the prospect to accommodate learners with special needs, up to the point where their educational needs are no longer met. B1’s comment that “we can actually do with 2 or 3 special classes per grade”, might in fact be a testament to teachers not knowing how to accommodate learners who have special educational needs. Insufficient teacher training is in contrast to the aim of *White Paper 6* to prioritise teacher training and differentiated instruction (*cf.* 3.3.3).

In alignment with their frustration with a lack of timely feedback from the DBE (*cf.* 4.3.2.3), the participants appealed for speedier feedback. A2 voiced her frustration by stating that “the people from the Department don’t come to the school to test the children, so the process stops”. The *SIAS* process is dependent on interaction between the school and the DBE, and although schools put the process into motion, the delay is caused by the DBE: “teachers cannot diagnose children and refer them to other schools, the people from the Department must do it” (A2). If the DBE delays the issuing of K-numbers, the entire *SIAS* process is halted. As a consequence, the participants appealed for continuous and timeous feedback from the DBE to see the *SIAS* process through:

- B3: “if only we got feedback from the Department more regularly, our work would be easier and things would get done faster”
- C1: “we need immediate help. What makes it difficult is when learners are referred to the Department and then months go by”.

A3 advocated for a more hands-on approach by the Department so as to “understand how difficult it is when a child sits in class and you know he needs help and you can’t do anything else to help him”. As noted by C1, “they then send therapists to the school, but it takes very long for them to contact and follow-up with us if the child does not experience severe difficulties in school”. As a consequence, unless a learner experiences major difficulties in school, feedback regarding learners who require low or moderate levels of support is often prolonged. “The people who try to enforce inclusion, sometimes don’t even have a clue what is going on in our schools” (C1). The findings subsequently revealed that the participants feel that if the DBE was more involved with the schools, there would be a better understanding of the impact of the delay on learners who are not able to receive the required support.

Two sets of recommendations emerged from the findings on how the *SIAS* process could be improved. The first set focuses on making the forms which accompany the *SIAS* policy, more user-friendly. Some of the participants suggested that the SNAs be made shorter by not repeating questions, while others advocated for a format where the teacher could select from a set of pre-determined generic answers. The suggestions are aimed at making the completion of the forms less time-consuming. The second set of suggestions are aimed at providing teachers with training on practical ways in which a variety of learning barriers can be accommodated in the classroom. The interviewees were of the opinion that the DBE is ultimately responsible for ensuring that the *SIAS* processes are executed. Although they understand the importance of collaboration between their schools

and the DBE, they highlighted their dependence on timely feedback from the DBE to see the *SIAS* process through.

4.4 DISCUSSION OF FINDINGS

The *SIAS* policy consists of four different components, namely screening, identification, assessment and support that are implemented over a period of time to reach the end goal of supporting learners who experience barriers to learning (*cf.* 3.5). From the findings it became clear that the implementation of the *SIAS* policy is greatly dependent on teachers' willingness to take action towards the achievement of its aims and objectives. The first component of the *SIAS* process involves the screening of all learners who enter a new school or a new phase. Their information must be captured in the *Learner Profiles*. Teachers seem to automatically screen learners by observing those who experience difficulties and then continue with the completion of the SNA 1 form (*cf.* 4.3.1.1). Completing the SNA is experienced as a challenge because it requires a lot of additional work and often involves a struggle with incomplete *Learner Profiles*. Even though teachers have to comply with the *SIAS* policy, and despite having a moral obligation to assist learners with learning barriers, the findings indicated that teachers sometimes consciously overlook those learners for fear of the additional administrative work it would entail. By implication, the possibility exists that many learners might not receive the necessary assistance they require for optimal learning. As such, the vision for an education system that "promotes education for all and fosters the development of inclusive and supportive centres of learning that enable all learners to participate actively in the education process" (RSA DoE, 2007: Section 4.2.1) can be hampered at the very start of the *SIAS* process.

When teachers identify learners suspected of experiencing barriers to learning, the learners must be assessed. Testing has, however, no relation to a learner's scholastic achievements; rather, the purpose is to assess the barrier(s) to learning itself (*cf.* 4.3.1.4). The participating remedial teachers indicated that they mainly assess learners' language skills and mathematical abilities, often using tests that have been in circulation for many years (*cf.* 4.3.1.3). Although the assessment of language skills and mathematical ability can provide more clarity on academic barriers, the emphasis on these skills only is problematic in light of the wide range of barriers noted in *White Paper 6*, namely systemic barriers, social barriers, pedagogical barriers and intrinsic barriers (*cf.* 3.3.4). Although several participants referred to the poor socio-economic circumstances of their learners, the emphasis on the assessment of language and mathematical skills foreground the

question regarding the extent to which systemic, cultural and socio-economic barriers to learning are taken into account. A one-size-fits-it-all approach to the assessment of learners can be detrimental to the construction of support strategies relevant for learners' unique needs and circumstances. A more holistic approach to assessment is needed to construct transparent support strategies that could address barriers that relate to more aspects than language and mathematics. To enable inclusivity in the classroom, systemic forms of discrimination in the broader society, and structural and cultural barriers embedded in schools, must be acknowledged and accounted for. A lack of specialised skills and insufficient resources would therefore counteract the purpose of the *SIAS* policy, which is to provide learners who experience barriers to learning with sufficient support (*cf.* 3.5).

The successful implementation of support strategies requires collaboration between various stakeholders, namely the learner, his or her parents, teachers and the DBE (*cf.* 4.3.1.4). The findings, however, revealed that support provision does not seem to extend far beyond the school's efforts. Inadequate support from parents is perceived as one of the major challenges in a school's effort to assist learners (*cf.* 4.3.2.2). Insufficient support from parents can take many forms, ranging from parents not providing the required information about their children (*cf.* 4.3.1.1), not being able to send their children to pre-primary schools, often due to financial circumstances (*cf.* 4.3.2.1), to parents not assisting their children with support strategies at home (*cf.* 4.3.2.2). Incomplete or missing information frustrates the *SIAS* process because teachers cannot complete the *Learner Profiles* and the SNA 1 forms, and this leads to a drawn-out process of learner referral for further intervention and support. In addition, a struggle with incomplete information can contribute towards teachers' negative attitude towards the process, which in turn, can feed into teachers' unwillingness to set the process in motion (*cf.* 4.3.1.2; 4.3.2.4). Children who enter formal schooling and who are not ready for school because they did not attend pre-primary schools, are often prone to experiencing barriers to learning (*cf.* 4.3.2.1). The support process is also often hindered by parents not implementing support strategies at home, often because of the expectation that it is the responsibility of the school or teachers (*cf.* 4.3.2.2).

The findings also foregrounded the important role of the DBE in the *SIAS* process (*cf.* 4.3.3). Even though there is communication between the school and the DBE throughout the *SIAS* process, the implementation of support measures are often hindered by delayed

feedback from the DBE. Drawn-out processes are one of the factors that contribute to teachers' negative attitudes towards the *SIAS* process. The participants cited examples of having to wait for months, or even years, for feedback from the DBE. A logical consequence of the delay and the subsequent frustrations is a cynical and uncooperative attitude towards the *SIAS* process (*cf.* 4.3.2.4). Because teachers only refer the learners with the most severe barriers to learning to the DBE, in other words learners who cannot be assisted in the mainstream classroom context with their specific learning needs, the expectation exists that learners must be moved into special classes or special schools. Two of the three participating schools had special classes which could accommodate learners with severe barriers to learning. These classes only accommodated learners up to grades 3 and 5 respectively, after which they are placed back into mainstream classes where little support is provided (*cf.* 4.3.1.4). Although it is generally accepted that it is ideal to identify learners with challenges as early as possible, the prioritisation of younger learners implies that intermediate phase learners (grades 4 – 7) do not receive the necessary remedial teaching. As such, learners with learning barriers remain marginalised and do not enjoy the necessary support to participate actively in the educational process.

The schools who participated in this study are classified as full-service schools and are supposed to accommodate all learners, even those who experience severe barriers to learning (*cf.* 4.3.2.5). FSS are expected to accommodate a full range of learning needs in an impartial way (*cf.* 3.3.3). The findings, however, revealed that the functioning of the schools as FSS is plagued by various problems. Teachers who are required to provide specialised teaching do not necessarily have the necessary and specialised skills to do this (*cf.* 4.3.2.4). A lack of in-service training seems to be both a problem and an opportunity. The findings indirectly revealed that teachers are receptive to training opportunities aimed specifically at dealing with learners who have special educational needs. The extent to which the components of the *SIAS* policy are executed is largely determined by the school's available resources. It can therefore be assumed that insufficient resources will restrict supportive measures. In this regard, the participants indicated that the *SIAS* process is hampered by challenges regarding a lack of enough special classes, a lack of remedial teachers and a lack of equipment (*cf.* 4.3.1.4). While I expected that the quintile levels of the schools would reflect in their ability to function as FSSs, I found the opposite. Regardless of the quintile, the participants shared similar experiences with the implementation of the *SIAS* process (*cf.* 4.3.2.5). In drawing on their frustrations with aspects of the process and their overall experiences, the participants

made several suggestions towards streamlining the *SIAS* process. Although the participants appeared to be negative towards some aspects of the process (*cf.* 4.3.2.4), their suggestions indirectly reflected their willingness to engage with the process. Suggestions relating to the simplification of the forms and the need for timely feedback from the DBE, point to teachers' perceptions of the *SIAS* process as an important step towards inclusive education. Implementing the *SIAS* policy has the ability to change the lives of learners who experience barriers to learning by providing them with much needed additional support. The findings did reveal that a shift in teachers' attitudes, skills development and resources are needed for an effective implementation of the *SIAS* policy in mainstream schools.

4.5 SUMMARY

The objective of this chapter was to present and discuss the findings regarding the experiences of mainstream schools with the implementation of the *Policy on Screening, Identification, Assessment and Support* (*cf.* 1.3.4). The findings emanated from the semi-structured focus group discussions with members of the SBSTs and individual interviews with the vice-principals of three participating schools. The data was then documented and analysed. Three themes emerged from the data: the *SIAS* process, challenges and recommendations. I used the knowledge gained in Chapters 1 to 3 to assist me in interpreting the analysed data. I was subsequently interested in how the participants gave meaning to their own realities and contexts regarding the *SIAS* process (*cf.* 1.4). Premised on the assumption that the participants construct their experiences in a subjective way, resulting in multiple realities and perceptions within the same context (*cf.* 1.4), it was interesting to note how the participants' experiences were more similar than different regarding the implementation of the *SIAS* policy. The four different components of the *SIAS* process, namely screening, identification, assessment and support, were discussed. While discussing the components of the *SIAS* process, specific challenges were highlighted and analysed. Some of the challenges that that were emphasised included school readiness, parental involvement, drawn-out processes, attitudes and resource availability. While participants discussed various aspects of the *SIAS* process and the challenges involved in these processes, they also made specific recommendations on how to minimise some of these challenges. The recommendations included the simplification of the forms found in the *SIAS* policy, improved interaction between schools and the DBE, and timely feedback from the DBE.

In the next chapter, I make comments and suggestion on the experiences in mainstream schools with the implementation of the *SIAS* policy.

CHAPTER 5: COMMENTS, SUGGESTIONS AND REFLECTION

5.1 INTRODUCTION

The aim of this final chapter is to comment on the research findings by making some suggestions towards the streamlining of the implementation of the *SIAS* policy. I draw on the findings from the document analysis and the subjective experiences of the participants to comment on the execution of the *SIAS* process, and by implication, on the implementation of the *SIAS* policy. The comments feed into suggestions on the *SIAS* process and the *SIAS* policy. This chapter is subsequently informed by the various chapters of this dissertation, which depict the logical unfolding of the study. In order to foreground the interconnectedness of the chapters in relation to the main aim of this study, I first explain the way in which each chapter informed the next, and how the chapters collectively contribute in answering my research question. In the next section of this chapter, I comment on the experiences of the SBST and vice-principals, and draw on the document analysis and the literature review to make suggestions on the implementation of the *SIAS* policy in mainstream schools. I conclude this chapter by reflecting on my experience with the undertaking of this study. I mention what I perceive as the strengths of the study, and foreground the challenges I experienced throughout the research process. The limitations of the study are stated as possibilities for further research opportunities. I conclude my reflection by indicating the scholarly and personal growth that emerged from this research endeavour.

5.2 OVERVIEW OF CHAPTERS

The aim of Chapter 1 was to provide an overview of the study. In alignment with my research interest, I indicated the main research question and the subsidiary questions (*cf.* 1.2), which in turn, led to the aim of the study, and foregrounded the objectives for the undertaking of the study (*cf.* 1.3). Framed as a qualitative study, I premised the study on the ontological assumption that reality is multiple, socially constructed and subjectively understood from the inside (*cf.* 1.4). The aim of the study was therefore not to generalise the findings to all mainstream schools, but to gain an understanding of how the participants make sense and give meaning to their unique experiences with the *SIAS* process. In order to inform my understanding, I undertook a literature review (*cf.* 1.5.2.1), did a document analysis (*cf.* 1.5.2.2) and conducted individual interviews and focus group interviews (*cf.* 1.5.2.3).

In Chapter 2, I explored relevant literature to gain an understanding of how inclusive education is conceptualised internationally, and to contextualise it for the South African context. Inclusion implies the accommodation of all learners, also those with disabilities, in education. International trends and understanding often dictate and inform localised perspectives, so I explored the international treaties which influence global perceptions on disability and provide a broad base for local implementation (*cf.* 2.2). The consideration of different approaches to inclusion in countries like Finland, Italy, Zimbabwe and Lesotho (*cf.* 2.5) assisted me to understand how a global perspective is contextualised to be relevant for a country's unique needs. Against my understanding of inclusion in education, I gave a historical overview of inclusion and inclusive education in South Africa (*cf.* 2.6).

Informed by the overview of inclusive education in South Africa, I focused on foregrounding the policy framework for inclusive education in Chapter 3. I analysed various official documents such as the *Constitution of the Republic of South Africa* (1996), the *National Education Policy Act* (1996), the *South African Schools Act* (1996), and the *Education White Paper 6: Building an Inclusive Education and Training System* (2001) (*cf.* 3.3.1 – 3.3.4). From the analysis of these documents, I was able to tabulate a policy framework for inclusive education (*cf.* Table 3.1). As my study was centred on the *Policy on Screening, Identification, Assessment and Support* (2014), I first positioned the policy within this policy framework and then discussed each of the four different components of the policy (*cf.* 3.5). With sufficient knowledge of the *SIAS* policy, framed within the South African legislative framework, I could start to generate empirical data in an attempt to answer my research question.

In Chapter 4, I presented and discussed the findings from the data analysis, which I generated through focus group interviews and semi-structured interviews. The themes that emerged from the data analysis enabled me to explore and discover the participants' realities regarding the implementation of the *SIAS* process. Informed by the interpretivist paradigm, I proceeded from the ontological assumption that multiple social constructed realities exist within any given situation (*cf.* 1.4). Thematic analysis was used, and the three main themes that emerged were discussed. The first theme pertained to the participants' experience with the *SIAS* process itself, in other words with screening, identification, assessment and support (*cf.* 4.3.1). The second theme focused on the challenges that the participants experienced with implementation (*cf.* 4.3.2), and the third theme foregrounded the recommendations made by the participants, based on their

subjective experiences, for the improvement of policy implementation (*cf.* 4.3.3). My interpretation and sense-making of the findings were informed by the knowledge gained from the document analysis (*cf.* Chapter 3), and my conceptualised understanding of inclusivity and inclusive education (*cf.* Chapter 2).

A synthesis of the preceding chapters enabled me to make comments on the experiences in mainstream schools with the implementation of the *SIAS* policy, and to make suggestions regarding such implementation.

5.3 COMMENTS AND SUGGESTIONS

In this section, I first draw on my findings of the document analysis to foreground the expectations for the implementation of the *SIAS* process, as embedded in the *SIAS* policy. To critically comment on mainstream schools' experience, I consider the (mis)alignment between policy promises and expectations, and the participants' experience. Based on this consideration, I make suggestions towards the advancement of inclusive education, mainly through improved resource provisioning, skills development and the strengthening of relationships.

5.3.1 Improved resource provisioning

According to Section 27 of the *Constitution* (RSA, 1996), it is the state's responsibility to protect and promote every individual's right to basic education, including those with disabilities. The protection of this right requires policies to facilitate the necessary support for persons with disabilities and/or special needs in an educational setting (*cf.* 2.6). Various acts and policies have subsequently been legislated to ensure adequate support for learners with disabilities and those who experience other barriers to learning (*cf.* 3.3.1). *White Paper 6* (2001) foregrounds the government's commitment to provide educational opportunities for learners who experience barriers to learning and development. As such, it is envisioned that those learners in need of moderate levels of support will have access to the required support in full-service schools, and learners in need of intensive support must be referred to special schools (*cf.* 3.3.4). Central to the realisation of this vision, is the availability of the necessary resources for ensuring quality education for all learners. As needs may differ, different resources are distributed with the aim of ensuring that all learners receive quality education (*cf.* 3.3.4). According to the *White Paper 6*, it is the responsibility of the school's governing body to allocate resources towards quality education, but if these resources are not adequate, they must be supplemented by the

state (*cf.* 3.3.3). While resources are crucial to promote inclusion and equality (*cf.* 3.3.3), it should be noted that resources do not only refer to financial assistance, but also includes the availability of equipment, skilled teachers and additional staff (*cf.* 3.3). All of the schools that participated in my research are classified as full-service schools, and it is therefore assumed that these schools should be able to “provide quality education to all learners by supplying the full range of learning needs in an equitable manner” (DBE, 2010a: Section1). The document analysis indicated that the purpose of full-service schools is to optimise learner participation in education and to subsequently reduce the risk of excluding any learner(s) from educational opportunities (*cf.* 3.5.2.3). As such, full-service schools must be in a position to provide the necessary resources to support learners with moderate physical and mental impairments.

Although the participating schools are classified as full-service schools, a lack of resources emerged as a recurring theme throughout the interviews (*cf.* 4.3.2.5). The difference between resources provisioning in mainstream schools compared to that of full-service schools relates to the role of the SGB and the DBE. In mainstream schools, a school’s budget must provide for resources, while FSSs should receive more support from the DBE (*cf.* 3.5.2.4). Despite this expectation, mainstream schools often lack the necessary resources and facilities to attend to a wide range of special needs, especially in cases where mainstream schools have been converted into FSSs (*cf.* 3.4). The findings corroborated this observation, as the participants indicated that they could see how their schools have benefitted from being converted into FSSs (*cf.* 4.3.2.5). It seems that the conversion of mainstream schools into FSSs does not necessarily imply that such schools receive the necessary resources and adjustments to accommodate learners with special educational needs. Insufficient resources were foregrounded as one of the challenges that hamper the implementation of the *S/AS* process. The findings revealed that schools need more support staff such as remedial teachers, more special classes, more resources such as paper to photocopy the documents associated with the *S/AS* policy, and more computers to provide learners with electronic assessment tests and to improve the quality of remedial teaching with the assistance of computer programmes. The findings indicated that School A’s remedial teacher had to attend to approximately 20 learners at a time, and the one special class accommodates grades 1 - 5 learners only. School B had to prioritise learners from grades 1 - 3 over Intermediate Phase learners, while School C combined grade 1 - 3 learners in a special class, after which they are placed back into mainstream education with little support (*cf.* 4.3.2.5). A lack of resources not only hinders the

implementation of the *SIAS* process, but has a dire influence on the realisation of the vision for inclusive education in South Africa (*cf.* 1.2).

In order to ensure that inclusivity is promoted and that the *SIAS* policy is implemented to the extent to which it is intended, strategies to improve resource provision need to be considered and executed. It is important to note that strategies for the improvement of inclusive practices must be context specific. South Africa's position on inclusive education has shifted from the *medical model of disability* to the *social model of disability* (*cf.* 2.4). As the *social model of disability* aims to banish barriers within society to improve the quality of life for those with disabilities, the solution for learners who experience barriers must be found within the education system itself. Couched within this model, the *SIAS* policy aims to shift the focus towards a more holistic approach to education in order to minimise the extrinsic barriers experienced by learners (*cf.* 3.5.1). One way to attend to the extrinsic barriers within the education system, is to assign more specialised staff to schools. The literature review on the case studies underlines the importance of specialised support for the implementation of inclusive education. In Finland, for example, each school provides all of its learners who are in need of additional support with remedial instruction (*cf.* 2.5.1). In Zimbabwe, inclusion is facilitated through the provision of specialised staff as support for learners with special needs in mainstream schools (*cf.* 2.5.3). The importance of specialised support in the form of a strong remedial basis cannot be overemphasised. In the light of the findings of this study, I therefore suggest that the national DBE allocate financial resources to the provincial education departments to strengthen the remedial departments of full-service schools by adding additional remedial teachers to each school. This is because mainstream schools seldom have the resources or facilities needed to address a wide range of special needs, even after being converted to full-service schools (*cf.* 3.3.4). Remedial teachers not only play a vital role in inclusion, but also in the implementation of the *SIAS* policy. Remedial teachers are able to provide specialised support services in the form of assessing learners suspected of experiencing barriers to learning, and assisting teachers in creating individual support strategies (*cf.* 4.3.1.3). I am inclined to believe that the addition of remedial teachers will provide more learners the opportunity to receive the additional support they require in the form of remedial teaching. This can be especially true for learners in the Intermediate Phase, as they often do not receive remedial teaching due to the prioritisation of learners in the Foundation Phase (*cf.* 4.3.2.5). Additional remedial support will subsequently curb the prioritisation of younger learners due to insufficient support at a school, and will, by implication, improve inclusivity.

In addition to adding remedial teachers to these schools, it is also necessary to improve the quality of remedial teaching by addressing the lack of resources. Equipping full-service schools' remedial classes with computers will not only improve the quality of remedial teaching, but will also help remedial teachers with the assessment of learners. The findings revealed that assessments are done manually, tend to be very time consuming and require the use of a lot of paper (*cf.* 4.3.2.5). Teachers seem to be placed in a position to choose between the management of the *SIAS* process, or conserving resources such as paper for regular daily operations. Consequently, the *SIAS* process is often hindered or halted completely. While the availability of computers in remedial classes can be helpful in the administering of electronic assessments, it will also provide much needed support for learners with physical disabilities. This is because it might be difficult for learners with physical disabilities to participate in the manual assessments done to determine other barriers to learning within the *SIAS* process. If it is determined that learners with physical disabilities also experience other barriers to learning and are referred for remedial teaching, not having access to computers can also make it difficult for them to fully participate in remedial activities.

Adequate resource provisioning is therefore crucial for the promotion of inclusion and the implementation of the *SIAS* policy. Both parties, namely schools and the DBE, have an obligation to frequently assess whether or not the resources that are available at schools meet the needs of learners who experience barriers to learning, as well as the needs of the teachers. Resource provisioning, whether it is provided by the schools or the DBE, must be sustainable in order to ensure that the *SIAS* policy is implemented effectively and that inclusivity is foregrounded (*cf.* 3.3.4). Resource provisioning at schools does not only pertain to sufficient remedial support in the form of additional remedial teachers and computers, but also to sufficiently trained teachers. A lack of support for teachers who do not have the necessary skills to adapt their classroom practises, contributes to the difficulties experienced by teachers when having to implement inclusion (*cf.* 2.6). The need for skills development is therefore highlighted in the next section.

5.3.2 Skills development

In 2001, the intention of the DoE, as stipulated in the *White Paper 6*, was to convert mainstream schools into full-service schools, to prioritise teacher training and to differentiate instruction (*cf.* 3.3.3). In order for schools to implement quality inclusive education practises, a flexible curriculum is required, and assessment techniques must be

adapted for those with special educational needs. From the empirical data, however, I gathered that teachers were unsure how to accommodate learners with learning barriers. Until 1994, teacher education students had a choice between studying either general education or special education (*cf.* 2.6). By implication, those teachers who did not opt for special education did not receive the necessary training to work with learners with special educational needs. As such, many teachers' uncertainty relates to a lack of the necessary skills. From the findings it could also be derived that such uncertainty contributed to the participants' negative attitudes towards inclusion, and more particularly, towards the practices related to the *SIAS* process (*cf.* 4.3.2.4). It also seemed as if the senior teachers still believe in segregated education, where learners with learning barriers should be taught in special schools, rather than in the inclusion of all learners in mainstream education. While this perception does not align with the vision for including learners with special needs in mainstream schools, it may relate to the participants' struggle to embrace inclusion, because they feel unequipped. (*cf.* 4.3.2.4). Although the implementation of the *SIAS* policy is largely dependent on teachers' inclination to initiate the *SIAS* process when they suspect a learner might be experiencing barriers to learning, the findings revealed that a lack of specialised skills prevents teachers to willingly engage in the *SIAS* processes (*cf.* 4.3.2.4). A negative attitude towards inclusion foregrounds the necessity for skills development opportunities. In addition, the findings revealed that although the participants try to adapt their teaching methods to support learners, despite challenges like large classes and other time-consuming activities, they value in-service training. Since they perceived their own initial training as insufficient, and as there has been no training for newly appointed teachers, the participants suggested training sessions on the policy as a means to improve the implementation of the *SIAS* process (4.3.3).

In light of the findings I suggest that in-service training on the *SIAS policy* and its associated processes are offered to teachers on a regular basis. While regular training can grant teachers the option to sharpen their skills at any time after their initial training, all newly appointed teachers can receive the required induction into the *SIAS* process. While regular workshops can help teachers to develop their skills to promote inclusion in their classrooms, it can also contribute towards teachers building the necessary self-esteem and confidence to attend to a variety of learning needs. On a more practical note, I suggest that the DBE oversee support programs or workshops for teachers from both mainstream and full-service schools. Such workshops can be presented by therapists and teachers from special schools, and can provide a platform where knowledge and

experience can be shared, and where teachers can be provided with practical methods to assist and support learners with special educational needs. Although such workshops should be endorsed by the DBE, it could mean that neither schools nor the different departments within the schools, have to wait for skills development workshops to be presented by the DBE. On a school management level, the SBST also has an obligation to provide the teaching staff with the necessary support to assist learners with different learning needs (*cf.* 3.5.2). I subsequently suggest that the SBSTs do frequent needs assessments amongst staff members to determine their specific needs and challenges in adapting their teaching methods to assist learners with different learning needs. The teaching staff, however, also has an obligation to voice their needs for additional training, and they should hold the SBST accountable if these training needs are not met.

It was seen from the literature that teaching staff's knowledge of inclusive education should not only focus on attending to learners with learning difficulties, but should include work with learners with physical disabilities (*cf.* 2.6). Learners with special educational needs do not always have access to special schools, and the implementation of inclusive education in South Africa requires that learners with physical abilities must be accommodated in mainstream schools. In 1989, Lesotho selected ten pilot primary schools and the staff received inclusive education training. These schools were then used as demonstration schools to work in conjunction with mainstream schools to assist them with the implementation of inclusive education practices (*cf.* 2.5.4). If South Africa were to follow a similar route, teachers who have received intensive training, can help to build a broad base of support for fellow teachers. Teachers could then draw on the experiences of fellow teachers and they can motivate one another by sharing good practices, while simultaneously receiving support with challenges they might experience in their classroom spaces. A skills-based approach supported by in-service training by therapists and experienced teachers could contribute towards changing teachers' perspectives on inclusive education, and minimise the attitudinal barriers that exist among teaching staff (*cf.* 2.6; also 4.4).

5.3.3 Strengthening relationships

The document analysis revealed that various acts and policies have been put in place to implement the South African government's legal and constitutional obligations towards including learners with disabilities into mainstream schools (*cf.* Table 3.1). The inclusion of learners with disabilities and those experiencing other barriers to learning in mainstream

schools imply that schools should be enabled to provide adequate support to education for all learners (*cf.* 3.3.1). The expectation therefore exists that learners who experience barriers to learning will be supported in all public schools, and even more so in full-service schools. In this regard, SASA highlights the responsibility of the Member of the Executive Council to “provide education for learners with special education needs at ordinary public schools and provide relevant educational support services for such learners” (*cf.* RSA DoE, 1996b; also 3.3.3). This statement relates to schools that have been converted into FSS. In order for learners who experience barriers to learning to receive the required support, a good relationship between the school and the provincial DBE is crucial. The relationship between the DBE and schools has a significant influence on the quality of the support that learners receive.

The findings revealed that one of the factors that cause stress in the relationship between schools and the DBE, is the amount of time it takes for the DBE to provide schools with feedback (*cf.* 4.3.2.3). In particular, the participants complained that when they have completed the *SIAS* process and learners are still in need of additional support, the DBE is very slow to respond to requests made by the schools. This complaint not only stemmed from the amount of time it takes to complete the *Learner Profiles* and SNA forms, but also from the expectation that the learner(s) in question are entitled to receive the support requested by the schools (*cf.* 4.3.2.3). Teachers’ frustrations seemed to be fueled by all the paperwork they have to do, and then having to wait for feedback from the DBE. Frustrations are exacerbated because while teachers do their part with regards to the *SIAS* process, their efforts are not reflected by the support they require from the DBE (*cf.* 4.3.3). The implementation of support strategies for learners are often halted until input from the DBE is received. Issues that impact on the relationship between schools and the DBE include getting members of the DBE to come to schools to assess learners in need of support, and for the DBE to allocate K-numbers (*cf.* 4.3.2.3). The amount of time that it takes for schools to receive feedback from the DBE not only halts further interventions for these learners, but has a negative influence on teachers’ attitudes towards inclusive education (*cf.* 4.3.2.4). Inclusion goals and implementation strategies can only be effective if policies are enforced by the DBE (*cf.* 2.6). However, while teachers receive little support a school level, they seemed to be willing to assist, but are left in the lurch by the DBE. The implementation of the *SIAS* policy subsequently requires a two-way involvement that is constituted by a sustainable relationship between the provincial departments of education and schools. It is therefore important that teachers’ attitude towards the *SIAS* process, the

SIAS policy itself, and the DBE changes. I suggest that the DBE critically reconsider the administrative workload involved in the *SIAS* process and revisit the turnaround time for feedback to schools. The participants were particularly negative in this regard and indicated the time consuming nature of compiling information and completing forms (*cf.* 4.3.3). The streamlining of forms should take place in consultation with teachers. Teachers have direct experience with the frustration of having to attend to repetitive questions, the difficulty in accessing specific learner information, and the DBE's delay in response to the issuing of K-numbers and learner assessments. I therefore suggest that a dialogical space is created where the members of SBSTs and the relevant officials from the DBE can meet, and discuss challenges and possible solutions. Such a space will allow the DBE the opportunity to explain the necessity for certain procedures and processes pertaining to the *SIAS* policy, instead of merely enforcing policy requirements. It will also allow teachers a voice and an opportunity to be acknowledged for their experience and expertise. This can feed into reciprocal understanding. It is in such a space that the DBE can start to understand teachers' daily realities. As indicated, the findings revealed that the participants are highly frustrated with the current versions of the *Learner Profile* and specifically the SNA forms they have to complete (*cf.* 4.3.2.4). In this regard, I suggest that the DBE creates an electronic platform where teachers can complete simplified versions of the current *Learner Profiles* and SNA forms. If teachers could complete the documents electronically, it would not only save time and resources such as paper, but it would also allow the representatives from the DBE to process information faster and provide schools with timeous feedback. Timely feedback from the DBE is crucial for building a strong relationship between the schools and the DBE, especially when the DBE is approached to further assist learners who experience barriers to learning. It can also be anticipated that a better understanding between schools and the DBE could assist in the development of positive attitudes towards the *SIAS* process. It is also possible that a more solid relationship will lessen the possibility of teachers shying away from identifying learners in an attempt to avoid becoming the case managers for overseeing the *SIAS* process.

It is also important that schools build good relationships with the parent(s) or guardian(s) of the learners. With regards to the *SIAS* process, I would like to present two reasons for the establishment of a good relationship between schools and parents. Firstly, schools must ensure that parents are involved in the initial information gathering stage. As it is important for teachers to have access to as much detailed learner information as possible when they complete the documents associated with the *SIAS* policy, parents should be

encouraged to provide such information, albeit based on their understanding of the necessity thereof. Schools must therefore ensure that parents understand the reasons why the personal information of learners and parents/guardians are needed. To streamline this process, I suggest that learners' application forms are expanded to contain additional and more specific personal information. In this manner, schools can centralise the information so that teachers don't have to struggle (*cf.* 4.3.2.3) to find the necessary information when they want to initiate the *S/AS* process. Information that is easily available to teachers, will also relieve some of their workload. Secondly, parents are expected to work in conjunction with the school and its teachers throughout the *S/AS* process, especially when support strategies are implemented. Support provision not only involves school-based interventions, but is also extended to additional undertakings at home where parents have to help their children with homework (*cf.* 4.3.2.2). As such, a strong relationship between the school and parents can assist in strengthening support measures, both on school level and at home (*cf.* 4.3.2.2). Parents are therefore reliant on the expertise and guidance of the teachers, and teachers are dependent on parents' cooperation with regard to providing learners with support at home. Schools should therefore provide a platform where teachers and parents can meet to discuss the expectations for the provision of good support to learners.

The need for better resource provisioning, skills development and improved relationships indicates a disjuncture between policy and practice. Policy intentions are usually good, but school realities do not always present a conducive landscape for effective policy implementation. In this study, I foregrounded how experiences in mainstream schools highlighted the gap between policy on paper and policy in practice. The implementation of inclusive education, and specifically the accommodation of learners with barriers to learning in mainstream schools that have been re-classified as FSS, requires adequate resources, teacher expertise and sufficient support from the DBE. While school realities and teachers' experiences and challenges are not acknowledged, the gap between the expectations of the *S/AS* policy and the actual implementation of the *S/AS* policy will continue to hamper the realisation of inclusive education.

5.4 IN REFLECTION

As with any research undertaking, my research yielded certain strengths, challenges, limitations and opportunities for further research. In this section, I also reflect on my scholarly and personal growth.

5.4.1 Strengths and challenges

One of the strengths of my study is the construction of a policy framework for inclusive education. A policy never stands as a singular entity, and in recognition of the fact that any one policy affects, challenges and impacts on others (*cf.* Ball, 2006), I analysed various policy documents, which I regarded relevant for the promotion of the inclusion of learners with disabilities and special educational needs. By attending to the intertextuality of the documents, I was able to consider how they influence and direct the implementation of inclusive education in general, and the *S/AS* policy in particular. Positioning the *S/AS* policy within a broader legislative framework, enabled me to understand equality and non-discrimination as the fundamental principles that inform the policy. In addition, I gained insight into how the policy forms part of a legislative framework that aims to assist in the transformation of South African education to accommodate a variety of learning needs.

Another strength of my study, which strongly alludes to the policy framework, is the foregrounding of the South African government's conceptualisation of inclusive education for the South African context. While many countries around the world place a great deal of emphasis on inclusive education, they all implement it in ways that are most suitable for their unique contexts (*cf.* 2.5). This study highlights the great deal of effort by the South African government in legislating policies to ensure that no learner is excluded from education. The *S/AS* policy was promulgated in 2013 and is the latest policy adopted in the attempt to strengthen inclusion in the South African education landscape. As such, the study assists in highlighting the ways in which the vision for inclusive education is pursued through the *S/AS* policy.

An array of challenges were experienced during the undertaking of this study. Initially I started my M.Ed. journey in the field of Psychology of Education. However, when I realised that my research idea alludes strongly to education policy studies, I had to redirect the demarcation of my study. Engaging in a different field of education and having to reconceptualise the study, resulted in me only starting with the research process eight months into the academic year. I was placed under tremendous pressure to finalise my research proposal for approval and to apply for ethical clearance from the University of the Free State before I could apply for permission from the DBE to conduct interviews with its employees. This permission-seeking process was prolonged and the delay at the DBE meant that I had very little time to generate my data before the commencement of the fourth school term. The DBE does not allow for any data generation at their schools during

the fourth term. Daily phone calls to the district office to emphasise the urgency of processing my application resulted in the required permission, albeit with only three weeks left of the third term. I had little time to conduct eight focus group interviews. In retrospect, I probably could have made contact with the schools before receiving permission from the DBE to make preliminary arrangements. While I was under enormous pressure, the responses of some schools exacerbated the situation. The vice-principal from the one quintile 2 school informed me that they were not interested to participate in the study, because none of the SBST members would be willing to participate in interviews after schools hours. One of the conditions for permission from the DBE was that my research would not affect any teaching time at any school. As I am a teacher myself, the only time I could conduct interviews was after school hours. I had to decide on another school and on my way to this particular school, the road was closed due to service delivery strikes. I did not feel safe to return to the school at another time, nor did I have time to search for and contact another quintile 2 school. I subsequently decided to work with three schools, instead of four as I initially planned. My intention was to conduct interviews with members of the SBST and the principals of the participating schools, but all of the principals referred me to their vice-principals. I found that even though the participants agreed to participate in the interviews, they were in a hurry to finish the discussions. I ascribe this to the fact that it was at the end of the term and that they probably had a lot of work to finalise. This resulted in me having to go back to two of the schools during the first term of the next year to gather more in-depth information that was not provided during the first round of discussions.

The amount of data that I gathered was often limited due to my lack of research experience. I believe that I could have gathered better data if I had more experience with conducting focus group interviews. Having a better understanding of focus group interviews would have enabled me to gather much more in-depth information than I had. I also found it difficult working with both Afrikaans and English speaking participants. This was because Afrikaans speaking participants' responses had to be translated into English before it could be analysed, which sometimes delayed the writing process. If I were to conduct future research I will make sure that I am totally confident with the data collection method(s) I choose to use. I would also set out to find participants who speak the same language as the language my work is written in.

Looking back on the type of the data that I collected and the ways in which it was interpreted, I realise that the focus of most of the data often related to the shortcomings within the South African education system. Because I am a teacher who is a part of, and know the state of, the current education system I must admit that personal bias directed my approach to the data that I collected and was seeking to collect.

5.4.2 Limitations and opportunities

This study is a qualitative study and participants from only three schools participated. From what I gathered from the empirical data, the experiences of the participating schools differed, mostly due to the availability or non-availability of resources. In hindsight, I therefore think that adding another school categorised as either a quintile 1 or 2 school would have added more value to my study. It is possible that the experiences of the SBST members of a quintile 1 or 2 school with the implementation of the *S/AS* policy, might be different from those of the SBST members of a quintile 3, 4 or 5 school. Exploring and comparing the experiences of schools at different ends of the spectrum might have added more depth to the study. Another limitation I realised towards the end of my study, was regarding the questions I asked during both the focus group and individual interviews. I mainly focused on the components of the *S/AS* policy itself, rather than on also including questions on the school environment, which plays a crucial part in the manner in which the components are implemented. I could have asked more context-specific questions. By asking additional questions relating to the school environment, more light might have been shed upon how the quintile levels of the schools impact on their daily operations, as well as on the way in which it affects policy implementation. More data could have added further depth to the study.

My study is qualitative in nature, but making use of mixed methods also could have contributed to the depth of the data that I generated. As I conducted focus group interviews with members of the SBSTs and the vice-principals of each of the participating schools, I could only explore their point of views. If I had made use of a mixed methods approach, I could have reached more SBST members using a questionnaire.

I do not perceive the limitations of a study in a negative light, but perceive them as opportunities for further research:

- I suggest that a study is undertaken, using mixed methods to involve more participants from more schools. A study that integrates both qualitative and

quantitative research methods can contribute towards a more comprehensive understanding of the challenges experienced in mainstream schools with the implementation of the *S/AS* process.

- Given the reality of South African schools being classified in terms of quintile levels, I suggest that a study is undertaken to include a wider selection of schools from different quintile levels. While some schools, depending on the quintile level, are entirely reliant on the DBE for support, other schools have the advantage of parents being in a position to pay school fees. Such a study can bring to the fore the unique challenges and experiences of schools who have been categorised on different quintile levels.
- The support component of the *S/AS* policy is very important. Although my study partially focused on support as part of the *S/AS* process, I suggest that research is undertaken that specifically focuses on the provision of support, albeit from different perspectives. Exploring the experiences of different role players, ranging from the parents of learners who experience barriers to learning to teachers who have to design support strategies and provide support, can shed light on both the challenges with and the sufficiency of existing support structures.
- The *S/AS* process and the implementation of its components seem to differ in the Foundation Phase and the Intermediate Phase. Although these differences were outside the scope of my study, I suggest that phase-specific research is done. Such a study can explore the specific experiences of Foundation Phase teachers and/or that of intermediate Phase teachers. As there are different criteria for the specific phases, it can be anticipated that there might be phase-specific challenges.

5.4.3 Scholarly and personal growth

By conducting this research, I grew significantly as a scholar. The ability to think and write critically did not come naturally to me, but I learnt that one could develop these skills. While I never really gave any thought to policy and practice, I had the opportunity to explore the similarities and differences between policy and practice. In working with the expectation of the *S/AS* policy versus the real life experiences of the teaching staff that have to implement it, assisted me to understand how the use of research methods and the guidance of a research paradigm can assist one in obtaining insight into the correlations (and the gaps) between policy on paper and policy in practice. I was initially very nervous as I conducted the interviews, as it was something that I had never done before. However,

with each interview I felt more comfortable. As my confidence grew, so too did my ability to probe for more information. I was therefore able to collect a substantial amount of in-depth data. My interviewing technique improved greatly from the first interview to the last.

On a professional level, I learnt a great deal from the documents that I analysed, and have since been able to reference these documents in conversations and at disciplinary hearings conducted with learners and their parents. As I am a teacher at a special needs school I am familiar with the *S/AS* policy, but only after I started with my research, did I fully come to understand the purpose of the policy. The findings of the study gave me a peek into the realities of the teaching staff in mainstream schools. I now understand the challenges they face in their attempts to implement inclusive education in their classrooms. I have gained new respect for these teachers as they still try, despite these challenges, to do their best for those learners who struggle with barriers to learning. I also realised how much the inclusion of all learners, especially those who experience barriers to learning, depend on teachers' willingness to assist them. This realisation changed the way in which I treat my own learners. I find that I am more receptive towards their challenges and feel even more inclined than before to ensure that they are optimally supported in my classroom. On a personal level, the research process also solidified to me that I am truly never too old to learn or to set goals for myself, no matter how immense the task at hand might seem. I realised that any of those goals can be achieved through perseverance and hard work.

5.5 CONCLUDING REMARKS

From my study, I realised that policy implementation is not a straightforward matter. It is one thing to present a policy on paper, but quite another to implement it, as it takes place in contexts that are constituted by the daily realities of teachers. In this regard, this study foregrounded how policy expectations are not always aligned with the lived experiences of teachers.

The development, maintenance and support for the education system is governed by a variety of policies and legislation. All policies must be in alignment with the *Constitution* which was founded on the values of equality and the advancement of human rights and freedom (*cf.* 3.3.1). All education policies that were enacted after 1994 emphasise the importance of including all learners in education. The *South African Schools Policy* (1996) obligates parents to send their children to school from the age of six, and by law, no public

school may refuse to admit any learner (*cf.* 3.3.3). Even though policies exist that enforce the inclusion of all learners in public schools, more has to be done regarding inclusive education practices to support learners who experience barriers to learning. The *S/AS* policy promotes support provision for these learners by providing a policy framework for the screening, identification, assessment and support to learners who need it (*cf.* 3.5.2). The aim of this policy is to enhance participation and inclusion in schools. The implementation of the *S/AS* policy is a process which is comprised of various stages, and the experiences of mainstream schools differ regarding the implementation of each of these stages. The findings from this study revealed that a lack of resources, together with insufficient teachers' skills, make it difficult to implement the *S/AS* policy and promote inclusive education in general (*cf.* 4.3.2.5). Schools' realities revealed that younger learners are prioritised for remedial teaching, and that learners who are referred to the special class, do not undergo the required comprehensive testing by the DBE. As a consequence, some learners are marginalised and do not receive the necessary support because schools usually only have one special class. When learners become too old for the special class, they are placed back into mainstream education. Placing these learners back into mainstream classes without providing them with ongoing support, exacerbates their barriers to learning. This state of affairs contradicts the inclusion goals of the *S/AS* policy, and violates the right of all learners to receive the education they are entitled to. For the *S/AS* policy to be implemented as intended, learners who experience barriers to learning need to have access to specialised support services, even if they are in mainstream schools. However, the gap between policy on paper and policy in practice foregrounds that the teaching staff is dependent on adequate resources, no matter how able they are. In addition, a lack of resources is often used as an excuse for teachers not having the skills to differentiate their teaching methods in order to accommodate learners with a variety of learning needs.

To address the gaps foregrounded by this study, the DBE, the DBST and SBSTs all have to ensure that teachers regularly receive training to develop their teaching skills. Although it seems that confusion exists at school level as to the responsible body for such training (*cf.* 4.3.2.4), the reality remains that teachers who do not receive regular training on special needs education, will struggle to provide the required support to learners and will most likely develop a negative attitude towards the *S/AS* process in particular, and inclusion in general. The implementation of the *S/AS* policy seems to be based on the assumption that schools have the required resources to accommodate learners who

experience barriers to learning, and that all teachers are equipped with the necessary skills to accommodate a wide range of learning needs. When bearing in mind the experiences in mainstream schools as foregrounded in this study, the expectations of the *SIAS* policy seem to be unrealistic. Policy implementation takes place in a particular context, and for mainstream schools to demonstrate the intended outcomes of the *SIAS* policy, the realities of schools should be evaluated and addressed against policy expectations.

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APPENDIX A: ETHICAL CLEARANCE: UNIVERSITY OF THE FREE STATE



GENERAL/HUMAN RESEARCH ETHICS COMMITTEE (GHREC)

14-Aug-2019

Dear Mrs Von Solms, Nastassja N

Application Approved

Research Project Title:

Exploring the experiences in mainstream schools with the implementation of the Policy on Screening, Identification, Assessment and Support (2014)

Ethical Clearance number:

UFS-HSD2019/0479

We are pleased to inform you that your application for ethical clearance has been approved. Your ethical clearance is valid for twelve (12) months from the date of issue. We request that any changes that may take place during the course of your study/research project be submitted to the ethics office to ensure ethical transparency. Furthermore, you are requested to submit the final report of your study/research project to the ethics office. Should you require more time to complete this research, please apply for an extension. Thank you for submitting your proposal for ethical clearance; we wish you the best of luck and success with your research.

Yours sincerely

A small, handwritten signature in blue ink, appearing to read 'Derek Litthauer'.

Prof Derek Litthauer

Chairperson: General/Human Research Ethics Committee

A larger, handwritten signature in blue ink, appearing to read 'Derek Litthauer'.

Digitally signed

by Derek

Litthauer

Date: 2019.08.14

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APPENDIX B: PERMISSION, FREE STATE DEPARTMENT OF BASIC EDUCATION

Enquiries: KK Motshumi
Ref: Research Permission: N Von Solms
Tel. 051 404 9283 / 9221 / 079 503 4943 Email: K.Motshumi@fseducation.gov.za



N VON SOLMS
Martie du Plessis Hostel: Flat 1
91 du Plooy Crescent
Fichardt Park
BLOEMFONTEIN, 9301

Dear Ms. Von Solms

APPROVAL TO CONDUCT RESEARCH IN THE FREE STATE DEPARTMENT OF EDUCATION

This letter serves as an acknowledgement of receipt of your request to conduct research in the Free State Department of Education.

- 1. Topic:** Exploring the experiences in mainstream schools with the implementation of the policy on Screening, Identification, Assessment and Support.
- 2. List of schools involve:** Brandwag, Heide, Koot Niemand and Bainsvlei.

Target Population: 3 – 10 Members of the School Based Support Team and 4 Principals.

- 3. Period of research:** From the date of signature of this letter until 30 September 2019. Please note the department does not allow any research to be conducted during the fourth term (quarter) of the academic year. Should you fall behind your schedule by three months to complete your research project in the approved period, you will need to apply for an extension.
- 4. The approval is subject to the following conditions:**
 - 4.1** The collection of data should not interfere with the normal tuition time or teaching process.
 - 4.2** A bound copy of the research document or a CD, should be submitted to the Free State Department of Education, Room 319, 3rd Floor, Old CNA Building, Charlotte Maxeke Street, Bloemfontein.
 - 4.3** You will be expected, on completion of your research study to make a presentation to the relevant stakeholders in the Department.
 - 4.4** The ethics documents must be adhered to in the discourse of your study in our department.
 - 4.5** Please note that costs relating to all the conditions mentioned above are your own responsibility.

Yours sincerely


DR JEM SEKOLANYANE
CHIEF FINANCIAL OFFICER

DATE: 23/07/2019

RESEARCH APPLICATION VON SOLMS N PERMISSION EDITED 19 JULY 2019

Strategic Planning, Policy & Research Directorate

Private Bag X20565, Bloemfontein, 9300 - Room 318, Old CNA Building, 3rd Floor, Charlotte Maxeke Street, Bloemfontein

Tel: (051) 404 9283 / 9221 Fax: (086) 6678 678

APPENDIX C: INTERVIEW SCHEDULES

INDIVIDUAL INTERVIEW SCHEDULE:

CONTEXTUAL BACKGROUND

- 1 How long has this school been implementing the *SIAS policy*?
Hoe lank implementeer u skool al die SIAS-beleid?
- 2 What are the most common barriers that learners at your school experience that could influence learning?
Wat is die mees algemene hindernisse wat leerders in u skool ervaar wat leer moontlik kan beïnvloed?

KNOWLEDGE OF THE POLICY

- 3 What do you consider the aim of the *SIAS policy*?
Wat beskou u as die doel van die SIAS-beleid?
- 4 Was any training or workshop(s) provided to you and your staff by the Department of Education on how to implement the *SIAS policy*? If not, what measures were put in place at your school to understand and implement the policy?
Het die Departement van Onderwys u en/of u personeel van enige opleiding of werkswinkels verskaf rakende die implementering van die SIAS-beleid? Indien nie, wat is tans in plek by u skool om die personeel te help om die implementering van die SIAS-beleid beter te verstaan?
- 5 Which steps are followed in cases where learners are suspected of experiencing barriers to learning?
Watter stappe word gevolg wanneer daar vermoed word dat 'n leerder leerhindernisse ervaar?
- 6 Following from above-mentioned suspicion, are the steps taken the same for the foundation phase learners as for the intermediate phase learners. If not, how do they differ?
Gebaseer op die stappe genoem in die vorige vraag, is die stappe wat gevolg word dieselfde vir die Grondslagfase en die Intermediêre fase? Indien nie, hoe verskil die stappe van mekaar?
- 7 Who is responsible for completing the learner's profile as set out in the *SIAS policy* and what is it used for?
Wie is verantwoordelik vir die voltooiing van die leerderprofiel soos uiteengesit in die SIAS-beleid en waarvoor word dit gebruik?
- 8 What are the SNA 1, 2 and 3 forms used for and who is responsible for the completion thereof?
Waarvoor word die SNA 1,2 en 3 vorms gebruik en wie is verantwoordelik vir die voltooiing daarvan?

EXPERIENCE WITH THE POLICY

- 9 Can you elaborate on the resources available at your school to support learners who experience barriers to learning?
Kan u uitbrei oor die hulpbronne wat by u skool beskikbaar is vir die ondersteuning van leerders wat leerhindernisse ervaar?
- 10 Can you elaborate on how you experience the *SIAS process*?
Kan u uitbrei oor hoe u die SIAS-proses ervaar.
- 11 What value do you think the *SIAS policy* has for the learners and the staff?
Watter waarde dink u het die SIAS-beleid vir leerders en u personeel?

- 12 Do you think the implementation of *SIAS policy* has the ability to transform mainstream schools in South Africa into fully inclusive schools?
Dink u die implementering van die SIAS beleid het die vermoë om hoofstroomskole in Suid-Afrika te transformeer na volle inklusiewe skole?

FOCUS GROUP INTERVIEW SCHEDULE:

1. What do you think are the most common barriers that your learners experience?
Wat dink u is die mees algemene hindernisse/struikelblokke wat u leerders ervaar?
2. Briefly explain how the screening process works in cases where learners are suspected of facing possible barriers to learning.
Verduidelik hoe die siftingsproses werk wanneer 'n onderwyser vermoed dat 'n leerder leerhindernisse ervaar.
3. How do you identify learners who might be experiencing barriers to learning?
Hoe identifiseer u leerders wat moontlik leerhindernisse ervaar?
4. Elaborate on the ways in which assessment is done when a learner has been identified having possible barriers to learning?
Kan u uitbrei op die maniere waarop 'n leerder geassesseer word wanneer geïdentifiseer is as 'n moontlike kandidaat met leerhindernisse.
5. Are the SNA 1 and SNA 2 forms user-friendly? If not, how can it be improved?
Is die SNA 1 en SNA 2 vorms gebruikersvriendelik? Indien nie, hoe kan dit verbeter word?
6. What challenges do you experience regarding the SIAS process?
Watter uitdagings beleef u rakende die SIAS-proses?
7. What resources from the school and the Department of Education could possibly minimise these challenges?
Watter hulpbronne het u nodig van die skool en die Departement van Onderwys om hierdie uitdagings op te los?
8. What do you think can be done in order to make the SIAS process more effective?
Wat dink u kan gedoen word om die SIAS-proses meer effektief te maak?

APPENDIX D: TRANSLATED QUOTATIONS

4.3.1.1 Screening

- A4: punte word ook as 'n maatstaf gebruik om te bepaal wie moontlike intervensies benodig (marks are also used to determine who might need interventions).
- C2: as die kinders toetse en assesseringstake doen besef die onderwyser as daar 'n probleem is (when the children do tests and assessment tasks, the teacher notices if there is a problem)
- B3: Ek kyk na die punte van die kinders.
(I look at the marks of the children)
Sê nou maar 'n kind drui aan die einde van die kwartaal dan meld ek hom aan by die RO-juffrou.
(If for example a child fails at the end of the term then I report him to the remedial teacher)
- B1: Hulle kry dit in die kinders se lêers, maar dit is party keer moeilik, want die ouers vul nie altyd die vorms volledig in nie of daar is dokumente wat kort
(They find it in the children's files, but it is sometimes difficult because parents do not always complete the forms in full or there is incomplete documentation).
- C1: dit alles vat tyd, want die onderwyser moet eers didakties doen en ekstra klasse gee en as daar nog steeds nie vordering is nie moet hulle dit na die School Based Support Team verwys.
(it all takes a time, because the teacher must first do didactics and give extra classes and if there is still no progress, they have to refer it to the School Based Support Team)
- A1 Onderwysers doen gewoonlik didakties vir omtrent drie maande of 'n kwartaal, as daar geen vordering is nie moet dit by die School Based Support Team aangemeld word en hulle besluit dan wat om volgende te doen.
(teachers usually do didactics for about three months or one term, and if there is no progress it has to be reported to the School Based Support Team who then decides what to do next)
Gewoonlik is die volgende stap om hulle na die RO-juffrou te stuur om getoets te word.
(Usually the next step is to send them to the remedial teacher for assessment)

4.3.1.2 Identification

- B2: Omdat ons heeldag met die kinders werk is dit vir ons maklik om agter te kom as daar iets fout is (because we work with the children every day, it is easy for us to determine when something is wrong)
Jy kan dit sommer sien
(you can easily see it)
- B3: meeste van die tyd identifiseer onderwysers deur te observer, maar die problem is dat ons nie by almal van hulle kan uitkom nie want ons klasse is te groot
(most of the time teachers identify through observation, but the problem is that we cannot reach them all because our classes are too big)
So dit is gewoonlik net die ergste gevalle wat ons optel en verwys
(So it is usually only the most severe cases that we pick up and refer)
- B1: die SNA 1 vorm word deur die onderwyser ingevul wanneer hy of sy vermoed dat daar iewers 'n probleem met die kind is, maar dit is 'n redelike hewige dokument om in te vul
(the SNA 1 form is completed by the teacher when he or she suspects that there is a problem with the child, but it is a difficult document to complete).
- C2: die onderwysers is bietjie moedeloos vir al die papierwerk, so die vorms word of onvolledig ingevul of hulle wil dit glad nie doen nie
(the teachers are disheartened with all the paperwork, so the forms are not fully completed or they don't want to do it at all).

4.3.1.3 Assessment

- B2: As 'n onderwyser bekommerd is oor 'n kind verwys hulle [die onderwysers] hulle [die leerders] na my toe en dan begin ons met die hele proses.
(if the teachers are worried about a child, they [the teachers] send them [the children] to me and then we start with the process)
Onderwysers kom gewoonlik na my toe met 'n skryfstuk waar die b's en d's omgeruil is, dan weet jy daar is 'n problem en die kind moet getoets word
(teachers usually come to me with a writing exercise where the b's and d's have been swapped, and then you know that there is a problem and the child needs to be assessed)
- C4: Ons doen die Milner-toets met die ouer kinders
(We do the Milner test with the older children)
Dis 'n speltoets
(It is a spelling test)
En dan die Bellard-toets vir die kleintjies wat wiskunde ook insluit
(And then the Bellard test for the little ones that includes maths)

- B2: Ek doen 'n screen test met die kinders wat na my verwys word
(I do a screen test with the children who get referred to me)
Dit is 'n toets wat spesifiek daarop fokus om leesprobleme te identifiseer
(It is a test that focuses specifically on identifying reading problems)
Ons doen diesefde toets al vir jare
(we have been doing the same test for years)
- C3: Jy moet verstaan dat leer nie effektief kan plaasvind as taalvaardighede nie in plek is nie
(you must remember that effective learning cannot take place if language skills are not in place)
As 'n kind sukkel om bv. te lees of te skryf, gaan hy sukkel om te leer
(If a child struggles to, for example, read or write he is going to struggle to learn)
En taal is die basis van enige vak, so as daar 'n probleem by die taalstrukture is gaan hy met al sy
vakke sukkel en aanhou sukkel tot die probleem opgelos is
(And language is the basis for any subject, so if there is a problem with language structures, he is
going to struggle and continue to struggle until the problem has been solved)

4.3.1.4 Support

- C1: ek dink dit is hoofsaaklik om op leerders te fokus en die te ondersteun wat hulp nodig het
(I think it is important to focus on and support children who need help)
- B1: [E]lke kind moet die kans gegun word om te leer, daarom is dit belangrik dat hulle ondersteun word
indien hulle ekstra hulp benodig
(every child must have the opportunity to learn, it is therefore important that they are supported when
they need extra help)
Wanneer daar leerders is wat sukkel pas die onderwyser gewoonlik hulle onderrigmetodes aan om
te kyk of dit nie dan beter gaan met die kind nie
(when there are learners who struggle, teachers usually adapt their teaching methods to see if the
child does not improve)
As die kind nog steeds nie verbeter nie, word hy of sy dan na ons RO-juffrou toe verwys vir
evaluering
(If the child still does not improve, he or she is then referred to our Remedial teacher for
assessment)
Die RO-juffrou toets dan die kind en die resultate van die toetse word aan die ouers en die
onderwysers, wat met daardie kind werk, bekend gemaak
(The remedial teacher then assesses the child and the results of the assessment are then presented
to the parents and the teachers who work with the child)
Die RO-juffrou maak aanbevelings oor wat onderwysers in die klas kan doen om die kind te help
(The Remedial teacher makes recommendations about what the teacher can do in class to help the
child)
Die onderwysers is dan verantwoordelik om hulle klaskamerpraktyke weer aan te pas om die kind te
akkommodeer
(The teachers are then required to adapt their classroom practises to accommodate the child)
- C1: leerders kry een keer 'n week terapie van ons RO-onderwysers
(learners receive therapy from our remedial teachers once a week)
- C1: omdat daar net twee RO-onderwysers is, ontvang die Graad 4 - 7's nie RO nie.
([B]ecause there are only two remedial teachers, the Grade 4 - 7's don't receive remedial teaching)
Daar is te veel kinders wat dit nodig het, so jy moet besluit wie dit die meeste nodig het
(There are too many children who need help, so you have to decide who needs it the most)
- C1: hoe gouer 'n probleem aangespreek word hoe beter, want dan is jou kans om die probleem op te los
beter.
(the sooner a problem is addressed the better, because then your chance of fixing the problem is
better)
- C1: [a]s 'n kind na didaktiese onderig nog steeds sukkel, word hy na die SBST verwys
(if a child still struggles after receiving didactics, he is referred to the SBST)
ons [SBST] kyk na wat die onderwyser gedoen het om die leerder in die klas te help, daarna maak
ons voorstelle oor moontlike veranderinge wat aangebring kan word
(we [SBST] look at what the teacher has done to help the learner in the class, and thereafter we
make recommendations regarding possible changes that can be implemented)
Dit word op die SNA 2 aangedui
(It is indicated on the SNA 2)
- B3: wanneer ons 'n kind help en daar is nie genoeg vordering nie, word die DBST benader om te help
(when we help a child and there is no or not enough progress, the DBST is approached for help)
- B1: ons spesiale klas
([o]ur special class)

Maar ons spesiale klas gaan net tot by Graad 3 en dan gaan hulle terug hoofstroom toe, want daar is nie 'n spesiale klas vir Graad 4, 5 en 6 nie
(But our special class only goes up to Grade 3 and then they go back to mainstream because there is no special class for Grades 4, 5 and 6)

- B1: dan is dit chaos en die akademiese probleem raak nog groter, want hulle kan nie met die werk 'cope' nie
(then it is chaos and the academic problems become even more because they [the learners] can't cope with the work)

4.3.2.1 Insufficient school readiness

- C3: Ek ervaar dat ons kinders glad nie skoolgereed is wanneer hulle in Graad R kom nie.
(My experience is that children are not at all ready for school when they reach Grade R)
Hulle is op geen terreine waar hulle moet wees nie.
(In none of the aspects they are where they are supposed to be)
Hulle het fisiese en perseptuele agterstande en van daar af 'snowball' dit, want die kind begin met 'n agterstand en die probleem raak meestal net groter
(They have physical and perceptual problems and from there it just snowballs, because if this happens the problems mostly only expand)
- B2: baie van die Graad R leerders het nie groot motoriese vaardighede nie, hulle moet speel, maar die kleuterskole fokus dalk te veel op die papierwerk gedeelte van skoolhou en die ontwikkeling van fyn motoriese vaardighede eerder as op speel
(many of the Grade R learners do not have gross motor skills, they should play, but the pre-primary schools maybe focus a bit too much on the paper work part of teaching and the development of fine motor skills rather than on play)
Ons maak van 'pencil grip' gebruik en middellyn kruising wat baie belangrik is vir leer
(We make use of pencil grip and midline crossing that is very important for learning)
Daardie vaardighede bestaan nog nie by al die kinders as hulle in Graad R kom nie, want die basiese groot motoriese vaardighede word nie in die kleuterskole ontwikkel nie
(These skills do not yet exist in some of the children when they get to Grade R, because the basic gross motor skills are not developed in pre-primary schools)
- C2: ek ervaar dat baie van my kinders nie naasteblyf reg is vir skool as hulle begin nie
(My experience is that many of my children are not nearly ready for school when they start)
Hulle het partykeer nie die vaardighede wat hulle nodig het vir skool nie en dis nie net fisiese vaardighede nie, maar emosionele vaardighede.
([t]hey often do not have the skills they need for school, and not just physical skills, but emotional skills)
Hulle sukkel om te sosialiseer, hulle kan nie met die werk 'cope' nie en dan raak hulle moeilik om te hanteer
(They have trouble socialising, they cannot cope with all the work and then they become difficult to handle)

4.3.2.2 A lack of parental involvement

- B1: [v]an ons kinders kom uit haglike omstandighede uit waar ouers drank en dwelms misbruik en by bendes betrokke is, ook die kinders, want daar is geen ondersteuning vir hulle van hulle ouers se kant af nie
(some of our children come out of horrid circumstances where the parents abuse alcohol and drugs and are involved in gangs and also some of the children, because they get no support from their parents)
- C3: [o]ns probeer van ons kant af om die kinders te ondersteun en te help as daar 'n probleem is, maar daar is soms geen ondersteuning van die ouers se kant af nie
(from our side we try to support the children and to help when there is a problem, but sometimes there is no support from the parents)
Hulle [die ouers] ondersteun nie die kinders of die onderwysers nie en dit maak ons werk bitter moeilik
(The [the parents] do not support the children or the teachers and that makes our job very difficult)
- C1: [b]aie keer het die ouers nie die kennis oor hoe om hulle kinders te help nie
(often the parents do not have the knowledge on how to help their children)
Dan nooi ons hulle om skool toe te kom dat ons vir hulle strategieë kan gee om dan hulle kinders te kan help, maar daar is nie altyd veel belangstelling van hulle kant af nie
(Then we invite them to school to give them strategies on how to help their children, but there isn't always a lot of interest from their side)

4.2.3.3 Cumbersome processes

- B1: [o]ns wag nou al twee jaar vir van die kinders se K-nommers

- (we have been waiting two years for some of the children's K-numbers)
 En die K-nommer bepaal of ons later vir die kinders konsessie sal kan aanvra
 (And the K-number determines if we will be able to request concession at a later stage)
 So dit vat so lank en maak die akademiese probleem net nog groter
 (So it takes so long and expands the academic problem)
- B1: Omdat ons nie die mannekrag het om vir al die kinders wat sukkel konsessie te gee nie, doen ons net aansoek vir die leerders wat dit die meeste nodig het
 (Because we don't have the manpower to grant concession to all the children who struggle, we only apply for the learners who need it most)
 So wanneer ons aansoek doen vir konsessie is dit nogal dringend, maar die hele proses word vertraag wanneer ons moet wag vir K-nommers
 (So when we apply for concession, it is relatively urgent, but the whole process is slowed down when we have to wait for K-numbers)
 Teen die tyd wat die hele proses afgehandel is en die kind konsessie kry kan die kind se punte reeds so swak wees dat konsessie nie eers sal help om hulle te laat deurkom nie
 (By the time the entire process has been completed and the child is granted concession, the child's marks might already be so bad that concession won't help them to pass)
- C2: ons is nie meer afhanklik van K-nommers nie, so ons kry terugvoer van die Departement sonder dit
 (we are no longer dependent on K-numbers, so we get feedback from the Department without it)
- C2: Dit is die terugvoer wat ons kry wanneer ons 'n kind na die Departement verwys het
 (It is the feedback we get after referring a child to the Department for help)
- C4: ons het so paar jaar terug 'n meisie gehad wat na ['n spesiale skool] toe is
 (a few years ago we had a girl who transferred to [a special school].)
- B2: Die SNA vorms is baie omslagtig, ek dink as dit meer gebruikersvriendelik was sou meer onderwysers die vrymoedigheid gehad het om dit in te vul
 (The SNA forms are very difficult to complete, I think if it was more user friendly the teachers would be more willing to complete them)
- C2: Ons het in die laaste twee jaar nie leerders se inligting ingelees nie, maar ek weet dis 'n baie tydrowende proses
 (we have not captured any learner information in the last two years, but I know that it is a very time-consuming process)
- C2: Die 'Learner Profiles'
 (the Learner Profiles)
- B1: Ons verstaan dat dit belangrik is om kinders te ondersteun wat hulp nodig het, maar ek dink wel dit kan op 'n korter manier hanteer word
 (we understand that it is important to support children who need help, but I think it can be done in a less cumbersome way)
 Die papierwerk is 'n langdurige, langsame proses wat die meeste onderwysers probeer vermy
 (The paperwork involves a long process that most teachers try to avoid)
 Dit is massas en massas werk wat ekstra gedoen moet word en dan is die ondersteuning wat ons van bo af [DBE] kry minimaal.
 (It is mountains of additional work and then we receive minimum support from above [DBE])
 So ek kan die personeel se frustrasie verstaan
 (So I can understand the staff's frustration)

4.2.3.4 Teacher attitudes

- A1: As ek moet eerlik wees dink ek dis 'n klomp papierwerk wat nie veel beteken nie, want kinders word geïdentifiseer wat sukkel en die proses word gevolg, maar die 'majority' van hulle bly dan maar steeds in 'mainstream'. So hoekom doen mens dan al hierdie werk?
 (If I have to be honest, I think that it is a lot of paperwork that doesn't mean much, because children who struggle are identified and the process is followed but the majority of them still stay in mainstream. So why do all this paperwork?)
- B3: Ons vul al hierdie vorms in
 (We complete all these forms)
 Ons wag 1 - 2 jaar vir terugvoer van die Departement
 (We wait 1 - 2 years for feedback from the Department)
 Dan is die kind alreeds klaar met die graad
 (Then the child has already completed the grade)
 Dan moet jy als van voor af doen, so die papierwerk hou nooit op nie en die kind sit dan nog steeds in hoofstroom. So hoekom dan al hierdie moeite doen?
 (Then you have to do everything again, so the paperwork never stops and the child still remains in mainstream. So why put in all the effort?)

- B1: Geen, want ons is nie opgelei om met kinders te werk wat al hierdie probleme het nie. Hoe moet ons hulle dan help?
(None, because we are not equipped to work with children who have all these problems. How must we then help them?).
- B1: [[]Jeerprobleme, fisiese probleme, gedragsprobleme, maatskaplike probleme. Van ons kindertjies het maar baie probleme, want hulle kom uit moeilike omstandighede uit
(learning problems, physical problems, behavioural problems, social problems. Some of our children have many problems because they come from difficult circumstances).
- B1: Ons het een middag 'n 'workshop' gehad
(We had a workshop one afternoon)
- C1: Ons het opleiding gehad so paar jaar terug
(We received training a few years ago)
- C2: Ek het een keer die Departement gekontak sodat hulle vir ons 'n kursus kan aanbied oor ADHD byvoorbeeld, want baie van my kollegas het gesukkel om die kinders te hanteer wat baie besig was in die klas.
(I once contacted the Department to give us a course on issues such as ADHD for example, because many of my colleagues were struggling to manage kids that were very busy in class)
Maar hulle [DBE] het vir my gesê dat dit die 'School Based Support Team' se verantwoordelikheid is om vir die personeel sulke opleiding te gee
(But they [DBE] told me it was the School Based Support Team's responsibility to provide staff with this type of training)
Ek is op die SBST en ek het dit nie geweet nie
(I am on the SBST and I was not aware of that)
- C2: nog nie, maar ons werk daaraan
([n]ot yet, but we are working on it)

4.2.3.5. Inadequate resources

- B2: [n]et die SNA is 10 bladsye, dan is dit nie die kind se rapporte of die bewyse van hulpverlening van die onderwysers of die uitslae van die toetse wat ek gedoen het nie. Dit is maklik 15, 16 bladsye per kind wat dan Departement toe moet gaan en dit moet gefotostateer word ook, sodat ons bewyse daarvan in die kind se lêer kan sit
(The SNA alone is 10 pages and it does not include the child's report cards, or the proof of assistance from the teachers, or the results of the assessments that I've done. It is easily 15, 16 pages per child that then needs to go to the Department which must also be photocopied so that we can put the evidence in the child's file)
Partykeer kan ek dit net nie doen nie, want as jy nie papier het nie het jy nie papier nie.
(Sometimes I just cannot do it, because if you don't have paper, you don't have paper).
- B2: Ons kort nog RO onderwysers. Ons kom nie by al die kinders uit nie, so ek werk net met die kinders wat regtig sukkel... die probleem is, mens het dan nog klaskamers nodig en die skool bars klaar uit sy nate, so hier is fisies nie nog plek vir ekstra klasse nie
(We need more remedial teachers. We cannot get to all the children, so I only work with the children who really struggle... the problem is, we need more classrooms and the school is already bursting at the seams, so we physically do not have enough space for extra classrooms)
- C2: Daar is net twee rekenaars vir al 60 van ons
(There are only two computers for 60 of us)
As jy die rekenaar wil gebruik moet jy dit 'uitboek' vir 'n spesifieke tyd
(If you need to use the computer you need to book it out for a specific time slot)
So ons kan eintlik doen met een rekenaar in elke klas
(So we actually need one computer in every class)
- C3: Ons het ook rekenaars in die RO-klasse nodig
(we also need computers in the RO [remedial teaching] classes)
Daar is nie rekenaars of internet vir ons of die kinders nie
(There are no computers or internet for us or the kids)
Dit sal regtig help as ons die aktiwiteite elektronies kan doen en selfs die toetse sal makliker wees
(It would really help if we could do activities electronically and even the assessments would be easier)
Al die assesserings wat ons doen word op papier gedoen
(All the assessments we do are done on paper)
- B1: Ons het... nie genoeg personeel soos RO en SO onderwysers nie... ons het nog SO klasse nodig... as ons meer SO klasse gehad het sou ons dalk minder dissiplineprobleme gehad het
(We do not have ... enough staff like remedial and SO [special education] teachers ... we need more special education classes ... if we had more special education classes, we would have less disciplinary issues)

- B1: op hierdie stadiuim kry ons nie die voordeel van dit nie
(at this point we don't receive any of the benefits)
- A1: Baie beslis nie
(Most definitely not)
Die beleid is daar en alles op papier lyk of dit 100% kan werk, maar waar dit by die implementering kom werk dit nie altyd so uit nie
(The policy is there and on paper it seems 100% possible, but when it gets to the implementation, it does not always work so well)
Om 'fully inclusive' te wees beteken jy het al die hulpbronne en mense wat jou skool benodig, maar hier is nog baie goed wat ons by ons skool kort
(To be fully inclusive means that you have all the resources and manpower that your school needs, but at our school there is a lot of things that we still need)
- C1: Nee. Dit gaan nooit werk nie. Ek voel ons het nie die kapasiteit of die tyd om dit te doen nie. Die klasse is te groot en die oorgrote meerderheid mense het ook nie die kennis om 'inclusion' suksesvol toe te pas nie
(No. It will never work. I feel that we do not have the capacity or the time to do so. The classes are too large and the majority of people do not have the knowledge to successfully implement inclusion)
- C1: die onderwysstelsel is van so 'n aard dat daar nie genoeg hulpbronne beskikbaar is vir al die goed wat jy nodig het om 'inclusive' te wees nie
(the nature of the education system is such that there are not enough resources available for all the things you need to be inclusive)
En daar is nie tyd in die curriculum om lesplanne vir elkeen van die kinders aan te pas nie
(And there is no time in the curriculum to adapt lesson plans for each of the learners)
En die mense wat probeer om 'inclusion' af te dwing het partykeer nie 'n idee wat in ons skole aangaan nie
(And the people who try to enforce inclusion sometimes don't have a clue what is going on in our schools)
- 4.3.3. Recommendations towards improved policy implementation
- C3: Ek is oortuig dat as die SNA's "noughts" en "crosses" was en die antwoorde kon net 'afgetick'word, dat meer onderwysers dit sou doen.
(I am convinced that if the SNA's were noughts and crosses and answers could just be ticked off, then more teachers would do it)
- C2: Die meerderheid mense het nie die kennis om 'inclusion' te implementeer nie.
(the majority of the people do not have the knowledge to implement inclusion)
- B1: Ons is 'n 'full-service school' maar ons kry geen opleiding oor hoe om kinders met spesiale behoeftes te leer nie
(we are a full-service school, but we don't receive any training in teaching children with special needs)
- B1: in 2015 en hulle het basies net verduidelik waaroor die beleid gaan... hulle het nie vir ons praktiese maniere gegee waarop die onderwysers leerders kan ondersteun wat in die klas sukkel nie
(in 2015 and they [the DBE] basically just explained what the policy was about... they didn't give us any practical methods in which teachers can support learners who struggle in class)
- B2: selfs al het ons opleiding in die beleid gekry is daar nog steeds personeel wat kom vra hoe om die verskillende vorms in te vul
(even after we received training on the policy, there are still staff that come and enquire how the different forms should be completed)
Ons kry baie nuwe onderwysers wat nie die opleiding in 2015 gekry het nie, so hulle weet nie altyd wat om te doen nie
(We have many new teachers who didn't get the training we got in 2015, so they don't always know what to do)
- B1: onderwysers probeer om hulle onderrigmetodes aan te pas, maar ons is sekerlik veronderstel om opleiding van die Departement te kry oor spesifieke maniere waarop ons hierdie kinders moet help
(teachers try to adapt their teaching methods, but we are surely supposed to receive training from the Department [DBE] on specific ways in which we should help these children)
- B1: ons kan eintlik doen met 2 of 3 spesiale klasse per graad
(we actually need 2 or 3 special classes per grade)
- B3: as ons net meer gereeld terugvoer van die Departement gekry het sou ons werk makliker wees en dinge sou vinniger gedoen kon word
(if only we got more regular feedback from the Department, our work would be easier and things would get done faster)
- C1: ons kort onmiddellike hulp. Wat dit moeilik maak is wanneer leerders na die Departement verwys word en dan gaan maande verby.

(we need immediate help. What makes it difficult is when learners are referred to the Department and then months go by)

C1: Hulle stuur terapeute na die skool, maar dit vat baie lank vir hulle om die skool te kontak en met ons op te volg as die kind nie ernstige probleme in die skool ervaar nie
(They then send therapists to the school, but it takes very long for them to contact and follow-up with us if the child does not experience severe difficulties in school)

C1: Die mense wat 'inclusion' probeer afdwing het partykeer nie 'n idee wat in ons skole aangaan nie
(The people who try to enforce inclusion, sometimes don't have a clue about the situation in our schools)

APPENDIX E: LETTER OF LANGUAGE EDITING

To whom it may concern

This is to state that the Master's thesis by Nastassja von Solms titled *Exploring the experiences in mainstream schools with the implementation of the Policy on Screening, Identification, Assessment and Support (2014)* has been language edited by me, according to the tenets of academic discourse.



B.Bibl.; B.A. Hons. (English)

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