# Scoping Inclusive Education for Canadian Students with Intellectual and Other Disabilities

**L'Institut Roeher Institute**

**Researched and written by**
**Cameron Crawford**

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## About The Roeher Institute

The Roeher Institute is a policy research and development ‘think tank’. Its mission is to generate knowledge, information and skills to help bring about and secure the inclusion, full citizenship, human rights and equality of people with intellectual and other disabilities.

Roeher’s research spans areas of key concern to people with disabilities, including: education, learning and literacy; income security and employment; disability supports; supports for children and families; values and ethics; community/social inclusion; health and well-being; and personal safety and security.

The Institute has conducted research for federal and provincial governments, international organizations and non-governmental organizations in the voluntary and private sectors.

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## Executive Summary

This report presents an overview of current issues in the inclusive education of students with intellectual and other disabilities in Canada and implications for advocacy and policy development.

The report discusses challenges to providing such an overview, given the present state of information and research resources in Canada on education and disability.

The report underscores what is already well established: that education is crucial to the economic and social well-being of Canadians, including Canadians with disabilities. The report also points to positive outcomes (e.g., higher levels of employment and community involvement) that are more likely to result from inclusive rather than segregated educational practices.

Overall the research found that progress has been made in advancing inclusive education: in recent years there has been general trend towards regular classroom placements for students with disabilities and a trend away from mixed arrangements involving a combination of regular and special education placements. The proportion of young adults who have undergone a robust model of inclusion (i.e., regular classroom placement with other needed supports) has been increasing.

However, the present educational ‘system’ is fraught with inconsistencies and tensions that hamper fuller implementation of inclusive practices. The proportion of students with disabilities who are exclusively in special education arrangements (aside from special schools) has remained fairly constant in recent years.

The research found that it is difficult to move inclusive education forward in the special education policy and program framework that continues to prevail widely in Canada. There is a tension between efforts to achieve excellence and equity in education and while the vision of inclusion is held out in most jurisdictions, there is wide variation in the interpretation and application of provincial policies by local school boards and schools. As a result, actual

implementation is inconsistent from place to place, between Catholic, public and private systems, between French and English systems and even between schools within the same system and community.

Considerable time, energy and resources are expended in assessing and labelling students as having *bona fide* disabilities that meet funding criteria. While individualized education plans are often developed, the process is time consuming; teachers tend to lack the required expertise; and there is no guarantee that the plans will accurately reflect student needs let alone drive instructional practices and evaluations of student progress and teacher performance.

Parents of children and youth with disabilities tend to have marginal involvement in the formal educational process, may not know about appeals processes and can face various disincentives to using those processes.

Additional funding to meet the needs of students with disabilities tends to be highly restrictive and difficult to secure, involving major time and effort by parents and educators. The disability-specific supports and other measures needed to further the education of learners with disabilities are often inadequate, uncoordinated and difficult to secure and may come on stream too late in the school year to foster the learning and broader participation of students with disabilities.

There is confusion and uncertainty about whether the classroom teacher or the teacher/educational assistant has prime responsibility for educating students with disabilities; roles for effective collaboration need to be clarified. Teachers tend to have only minimal exposure to issues of disability in pre-service training and limited opportunities and incentives to develop their knowledge and skills in this area through ongoing professional development.

These factors together create considerable challenges for teachers who may be philosophically supportive of moving an inclusion agenda forward but who often feel hampered and ill prepared to do so effectively.

The present report provides concrete ideas on how stakeholders in education can work in their respective spheres and collaboratively to ensure that

teachers have the supports they need for inclusion. The report also draws objectives, values and principles from various federal-provincial-territorial agreements and shows how these can be nuanced to support the inclusive education of students with intellectual and other disabilities. Those objectives, principles and values could provide a broad Canadian basis for governments and other stakeholders to work effectively together to ensure that the needed supports for teachers are in place so all learners can thrive in regular classrooms and schools. Research directions provided in this report could, if carried out, enable the tracking of progress and drift and could result in a better-informed educational system.

# I. Overview

This report presents an overview of current issues in the inclusive education of students with intellectual disabilities in Canada and implications for advocacy and policy development.[1] Overall the research found that, while progress has been made in advancing inclusive education, the present 'system' is fraught with inconsistencies and tensions that hamper fuller implementation of inclusive practices. Stakeholders in inclusive education – parents, teachers and their respective organizations, school-based leaders, school districts, ministries of education, and universities – could further progress by adopting a more coherent and collaborative approach, dimensions of which this paper presents.

As context, the report provides some working definitions of disability, disability supports, intellectual disability and inclusive education. It points to the general importance of education – and of inclusive education in particular – to the social and economic situation of people with disabilities in Canada. The report then addresses several key questions:

- How, or on what basis, do we know about the general educational situation of children and youth with intellectual and other disabilities?
- Given the data sources and knowledge available, what are some of the key issues and challenges to furthering quality education in regular schools and classrooms for these students?
- What are some of the practical implications that parent groups, other organizations and policy makers would do well to hold in view in their efforts to advance quality, inclusive education for all learners?

[1] Cameron Crawford, President of The Roeher Institute, wrote this paper. Shawn Pegg, staff researcher at The Roeher Institute, conducted background research.

## II. Definitions

### A. Disability

For several years, now, The Roeher Institute has defined ‘disability’ as one or more limitations in carrying out activities of daily living and in participating in the social, economic, political and cultural life of the community. Such limitations may arise from:

- a physical, sensory, intellectual, emotional or other personal condition such as a long-term health problem;
- societal stereotypes about such human conditions; or
- ways of organizing social, economic and built environments that, in their effects, exclude or impede the participation of people with such conditions (Roeher Institute, 2002, p. 5).

This definitional approach is a synthesis of traditional bio-medical and more contemporary social models of disability (e.g., Barnes, Mercer, & Shakespeare, 1999).

### B. Disability Supports

More than two million Canadians have a disability and need one or more human, technological or other supports so they can overcome limitations to carrying out activities of daily living and in participating in the social, economic, political and cultural life of the community (Fawcett, 2004; Roeher Institute, 2002; Statistics Canada, 2003a). Typically such supports include human assistance and aids/devices for participation in education, employment, leisure and various other activities (e.g., accessible transportation; modified curricula or individualized instructional strategies; accessible workstations, classrooms and features in the home environment; modified computers and other equipment; attendant service needed to get ready for school in the morning, occasionally throughout the day and at home in the evening; assistive devices such as

mobility and communication aids needed at home, school and in other situations (Roeher Institute, 2002, pp. 5-6).

### C. Intellectual Disability

Definitions of intellectual disability are contested ground. For instance, IQ cutoffs can range from 70 to 75. There is variation in whether environmental factors are taken into account (e.g., availability of support systems) and whether measures of adaptive behaviours or aetiology (familial/cultural and organic) are factored into the definition. Horwitz, Kerker, Owens, and Zigler (2000) provide a helpful discussion. Generally, definitions connote long-term conditions with onset before 18 years that involve significant cognitive limitations and that affect adaptive functioning in everyday activities that most people can do without major difficulty.

In Canada and internationally, the term 'intellectual disability' is becoming the preferred term. While the term 'mental retardation' is still widely used in the United States, the President's Committee on Mental Retardation was recently renamed the President's Committee for People with Intellectual Disabilities, suggesting that 'intellectual disability' is becoming the preferred terminology in that country as well.[2]

While the terms 'developmental delay' and 'intellectual disability' are technically distinct from other 'developmental disabilities' (see American Psychiatric Association, 1994), the terms are often used interchangeably.

Prevalence estimates of intellectual disability vary from about 0.7% to about 3% of the general population. While there are no 'official' data for Canada, Bradley et al (2002) recently found a prevalence rate of 7.18 per thousand in Ontario, a figure similar to Scandinavian countries but that researchers believe probably understates the actual prevalence. The figure used by the Ministry of

[2] See, for instance, the website entitled, "Administration for Children and Families – President's Committee for People with Intellectual Disabilities", dated May 2005 at http://www.acf.hhs.gov/programs/pcpid/index.html, compared with the website address entitled "Administration for Children and Families – President's Committee on Mental Retardation (PCMR)", dated September 2000 at http://www.acf.hhs.gov/news/facts/pcmrfspr.htm.

Children and Family Development in British Columbia is 1% (British Columbia. Ministry of Children and Family Development, 2001). An official from the Ontario Developmental Services Branch of the Ministry of Community and Social Services told The Roeher Institute in 2001 that the Branch estimated a total of about 90,000 people with intellectual disabilities in the province. That figure works out to about 1% of the general population. In contrast, a senior government official who worked in developmental services in Alberta recently told The Roeher Institute that Alberta was using prevalence estimates that ranged from about 2% to 2.5%. Data from Statistics Canada's recent Participation and Activity Limitation Survey (PALS – Statistics Canada, 2002b) indicate a prevalence of about 0.6% (Table 1), which may mean that the survey is picking up people with developmental disabilities who have a relatively severe level of functional limitation.

**Table 1. Participation and Activity Limitation Survey (PALS) 2001 data on people with intellectual disabilities in Canadian households**

| Age group | People with intellectual disabilities (numbers) | All Canadians (numbers) | People with intellectual disabilities as a percentage of total population |
|---|---|---|---|
| 0-4* | 17,820 | 1,641,680 | 1.1% |
| 5-14** | 46,180 | 3,904,330 | 1.2% |
| 15+** | 120,140 | 23,445,760 | 0.5% |
| | 184,140 | 28,991,770 | 0.6% |

*Developmental delay: Child younger than 5 years has a delay in his/her development, either a physical, intellectual or another type of delay.
**Developmental disability or disorder: People older than 4 years who have cognitive limitations due to the presence of a developmental disability or disorder, such as Down syndrome, autism or mental impairment caused by a lack of oxygen at birth.
Source: Statistics Canada, 2002b.

The US President's Committee for People with Intellectual Disabilities uses the following language to discuss the prevalence of developmental disability:

> "The US Census does not collect national data on people with intellectual disabilities (mental retardation). Data is based on best estimates from various authorities in the field. The usual national percentages are estimated to be 1% (which usually includes all or most persons currently receiving services in the MR service system), 2% (includes the preceding plus those who were once served in the MR service system but are no longer in it), 3% (includes the preceding plus the "unknown" cases discovered through epidemiological or other studies in the search for people with mental retardation. For example, they may include those

residing in rural isolated areas where MR services may not exist, or in poverty areas of inner cities where people may not know about resources available to them, or not know how to access services, and other populations not usually counted). In some rare circumstances, a few parents may hide or even deny the existence of an intellectual disability in their child or not even know that there child with “mild” mental retardation has a disability" (US Department of Health and Human Services, 2005).

## D. Inclusive Education

Approaches to, and definitions of, inclusive education can also vary (Nind, Shereen, Sheehy, Collins & Hall, 2004). Common threads are the need for school-wide approaches, the belief that all children can learn, the need to develop a sense of community, services based on need rather than location, natural proportions of students with disabilities, attendance of children with disabilities at neighbourhood schools, supports provided in regular rather than separate education, teacher collaboration, curriculum adaptations, enhanced instructional strategies and a concern for standards and outcomes. However, definitions vary on the extent to which students with disabilities would ideally be placed in the regular education classroom (e.g., part-time, full-time) and emphases can differ, with some approaches focusing on the transformation of individual school cultures and others on broad-level systems change (Lipsky & Gartner, 1999 in Artiles, 2000).

Dyson (1999, in Artiles, 2000) has argued that varying definitions and goals contribute to discourses that run along the lines of ethics (e.g., justice and equality demand inclusion), efficacy (e.g., separate education is no more beneficial than inclusive approaches) and the practicalities of realizing inclusion (e.g., the politics of systems change; funding requirements; regulatory regimes; knowledge resources needed; dimensions of school culture and professional practice implications).

The Roeher Institute has been using a working definition of inclusive education that is based on an approach developed in 2003 in Fredericton by a panel of knowledgeable educators, education administrators, government officials, researchers (university-based and other), family members and

community advocates who are familiar with issues of disability, education and inclusion (Roeher Institute, 2003c). The approach is consistent with the vision of inclusion as set out in the *Salamanca Statement* (UNESCO, 1994), which has helped shift the focus of international actions in education towards inclusive approaches and away from instituting separate arrangements for students with disabilities.

Refocusing the Fredericton definition slightly to emphasize the role of the teacher, inclusive education can be defined as arrangements where the teacher has the instructional and other supports that are needed to:

- welcome and include all learners, in all of their diversity and exceptionalities, in the regular classroom in their neighbourhood school with age peers:
- foster the participation and fullest possible development of all learners' human potential; and
- foster the participation of all learners in socially valuing relationships with diverse peers and adults (Crawford & Porter, 2004).

It is understood that any child, regardless of whether he or she has a disability, may need individualized attention and support from their teacher to address difficulties with the curriculum on any given day. However, where such support is needed outside the regular classroom, in an inclusive system this would be for as brief a period of time as possible with an active plan to reintegrate the student into the regular classroom as soon as possible with appropriate supports for the teacher and student.

As explained more fully by Crawford & Porter (2004), this approach addresses inclusion on multiple levels, i.e., classroom, school, community and system (i.e., legislative, policy, regulatory and funding arrangements) and takes into account the need for clear vision based on values and ethics, as well as advocacy, political support and other pragmatic measures.

## E. Emergence of Inclusive Education

Inclusive education in Canada began in Hamilton, Ontario in the Hamilton-Wentworth Separate School Board in 1969. This school system was the first large system anywhere to opt for change from the special education model to an inclusive model. The Board did so without fanfare or publicity and on the basis of a reasonable examination of the situation of students with disabilities. To this end, Hansen (2001points out that “the integration of all children into the ordinary school system is a reasonable aim which, however, does not require … revolutionary re-thinking of current attitudes … practices and provisions ... ” (p. 4).

Today there are no special schools, fulltime special classes or part time special classes in the Hamilton-Wentworth Catholic system. Every student, no matter what category or degree of challenge, is in a regular classroom in that system. Hamilton-Wentworth is unusual in that educators led the change to inclusion; in many other instances it has been parental pressure or government mandates that have initiated this change.

Several other Canadian systems have followed the Hamilton-Wentworth example. The Yukon, Nunavut, and Northwest Territories, as well as the province of New Brunswick, have passed strong policies for inclusion. However, education policies of most other provinces, while allowing and even encouraging inclusion, are based on the special education model.

The special education model has grown from roots in the medical/ psychological approach to disability. It is based on the belief that academic and social differences between students with and without disabilities are of such significance that separate educational provisions are required for many individuals. Students are clustered according to type and degree of disability (e.g. developmental delay, learning disabilities, giftedness, etc.) and are often set apart from other students through special settings, special teachers, special pedagogical approaches and formal identification and categorization (i.e., ‘labelling’).

In a special education framework, students with disabilities may sometimes be integrated in regular classrooms on a fulltime or part-time basis. However, there is always the chance that the inability of the student with a disability to maintain academic and/or social pace with other students will lead to alternative placement because such inability is typically framed as the failure of the student instead of as a shortcoming of teaching methods, resources or other school arrangements. Once designated a learner with 'special needs' and assigned to a special education placement, it can be difficult for the student to overcome this status.

Bunch (1997) has discussed the ease of entering the special education system and the difficulty of exiting it as the 'Eye of the Needle' exit model, illustrated in Figure 1.

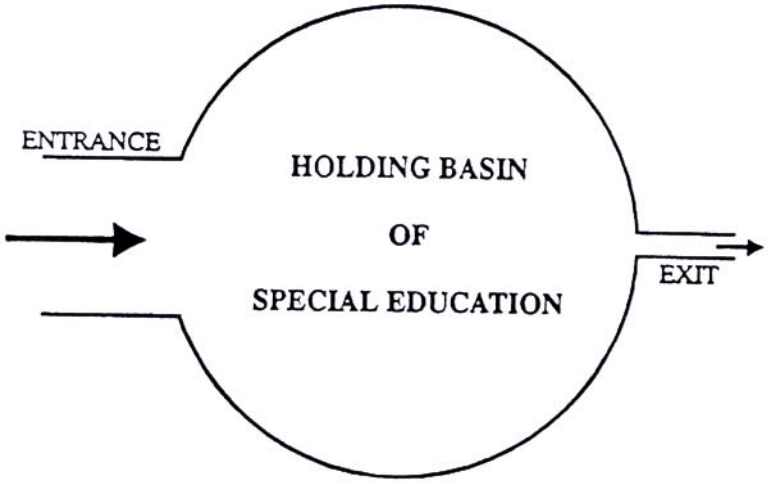



**Figure 1. 'Eye of the Needle' Exit Model of Special Education**

The inclusive education model challenges the cornerstones of the special education model, notably the beliefs that differences in academic and/or social achievement between students with and without disabilities are too difficult to be accommodated in regular educational settings; that special settings are more effective than regular classroom environments for students with disabilities; and that labelling is key to appropriate service.

Advocates of inclusion argue that the rights of and benefits to learners with disabilities who are included in regular classroom environments outweigh the challenges to teachers inherent in such a situation. Such advocates tend to argue that, with the support of properly trained resource teachers, regular classroom teachers should be able to work effectively with all students. Academic and social achievement has actually been found to be higher in regular education with mixed groupings of students from diverse backgrounds and abilities settings (Willms, 2002). It is also possible for students without disabilities to benefit from being educated in the company of peers with disabilities (Roeher Institute, 2003a).

## III. Education Matters

Education is a cornerstone of responsible citizenship in robust and stable democracies. Since the Confederation of Canada, governments and ordinary citizens have recognized the importance of education and have made public provision for its universal availability to children and youth at the elementary and high school levels. Presently Canada spends 3.3% of GDP on public elementary and secondary education – $39.6 billion in 2002/03 (Nault, 2004).

Figures 2 – 6 show that, with increases in the level of education attained, the chances also increase that people will be integrated within the paid labour force, will enjoy economic security, will participate in a range of community activities and will enjoy better health and wellness overall. The figures draw from data provided by Statistics Canada's National Population Health Survey (NPHS) of 1998 and the Participation and Activity Limitation Survey (PALS) of 2001.

**Figure 2. Percentage of working-age people (15-64 years) employed in 1998, by level of education**
**Source: National Population Health Survey 1998**

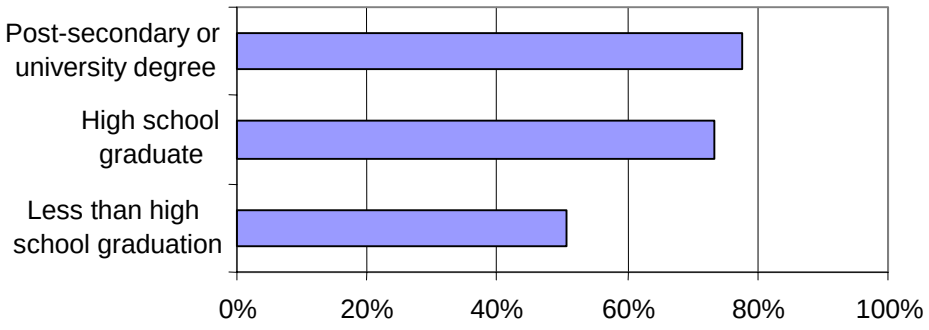


**Figure 3. Percentage of Canadians (15 yrs +) in excellent or very good health, by level of education**
**Source: National Population Health Survey, 1998**

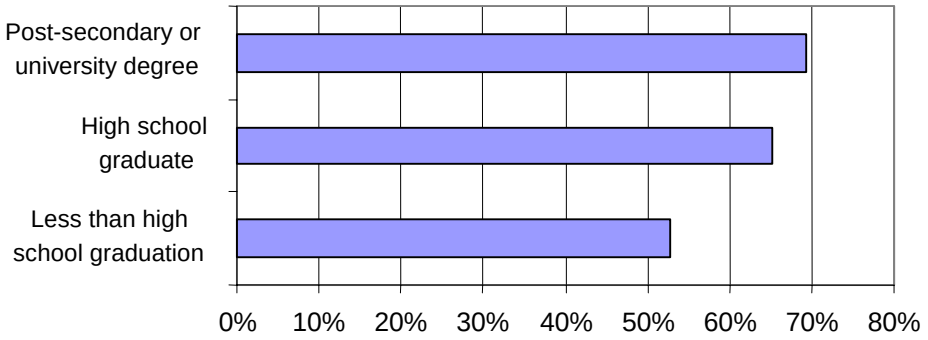
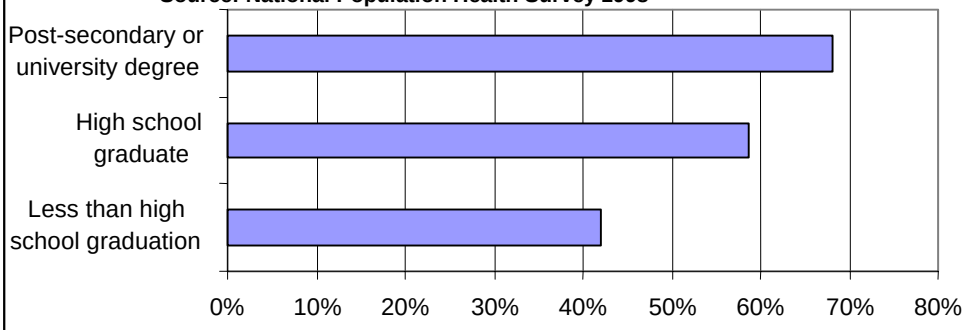



**Figure 4. Percentage of Canadians (15 yrs +) with incomes in the highest two quintiles, by level of education**
**Source: National Population Health Survey 1998**




*A quintile is defined as one-fifth of the total population.

**Figure 5. Degree of depression (max=8), by level of education (adults 15 yrs +)**
**Source: National Population Health Survey, 1998**

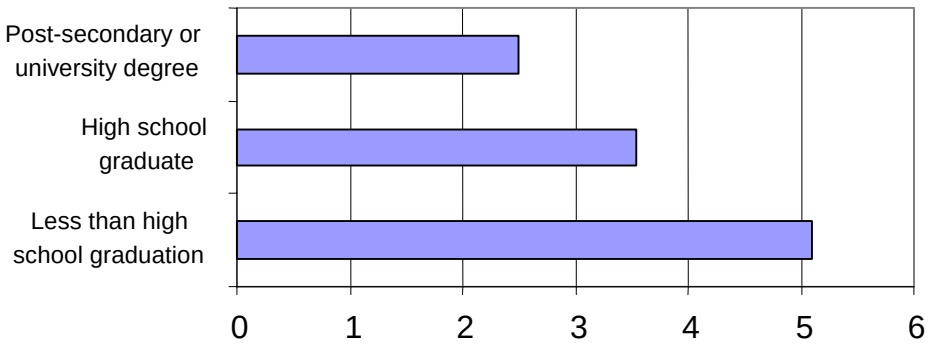
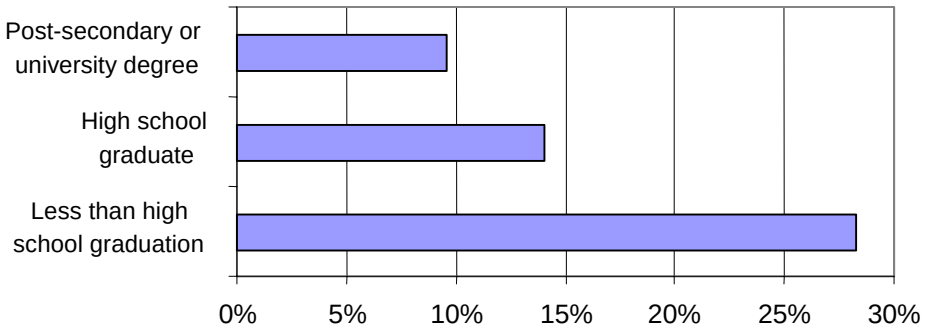


**Figure 6. Percentage of adults with disabilities who never participate in community activities, by level of education**

**Source: Participation and Activity Limitation Survey, 2001**



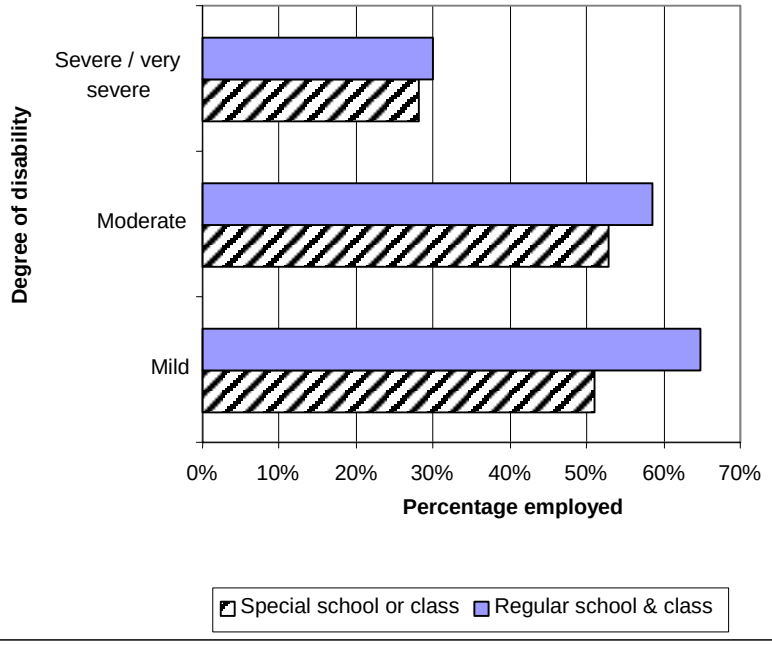

*Community activities are defined as ones that involve people other than immediate family or friends, such as volunteering, doing hobbies outside the home, attending sporting or cultural events (e.g., plays, movies), taking personal interest courses, visiting museums, libraries, or national or provincial parks. Shopping, physical activities and travel for business or personal reasons have not been included.

## IV. Inclusive Education Matters

Inclusive education is associated with positive outcomes. For instance, people disabled before completing their schooling, and who have been educated in regular instead of special education programs, are more likely to be involved in the paid labour force later in life. The trend generally holds up regardless of the nature or severity of disability (Figures 7 – 8).[3]

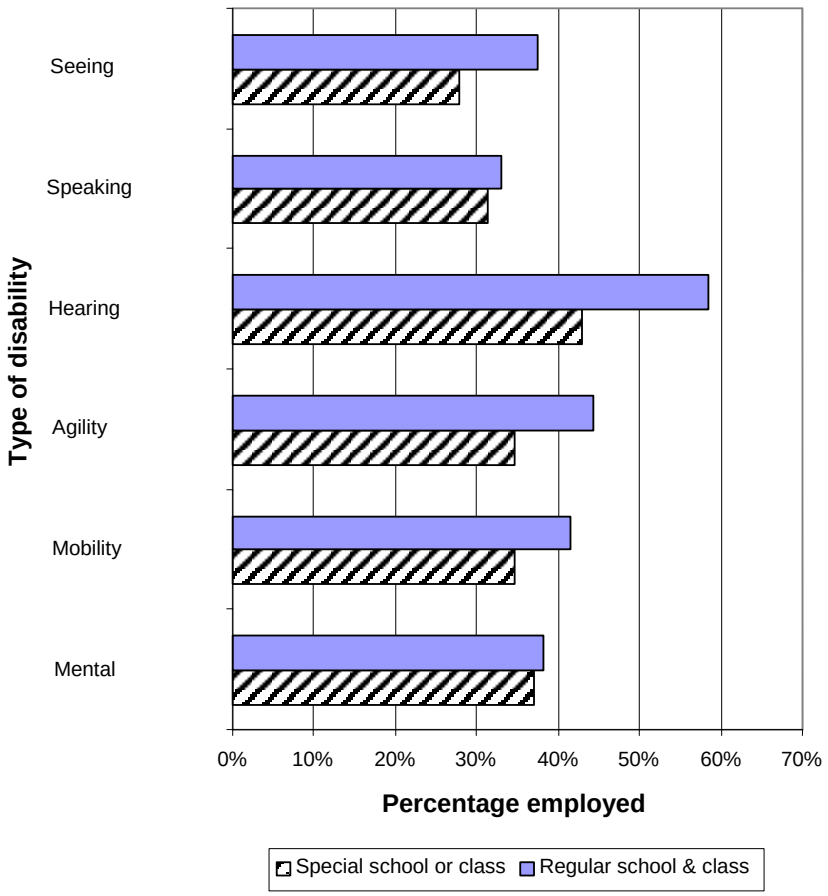
**Figure 7. Percentage of working-age people who had a disability before completing school and who are employed, by degree of disability and whether they received special education**

**Source: Participation and Activity Limitation Survey, 2001**




[3] Findings based on PALS data are similar to unpublished findings by The Roeher Institute based on the Health and Activity Limitation Survey (HALS) of 1991.

**Figure 8. Percentage of working-age people who had a disability before completing school and who are employed, by type of disability and whether they received special education**
**Source: Participation and Activity Limitation Survey, 2001**




We enquired further into the education of people with disabilities. Using the Participation and Activity Limitation Survey of 2001 (PALS) we took as a robust model of inclusive education cases where people with disabilities:

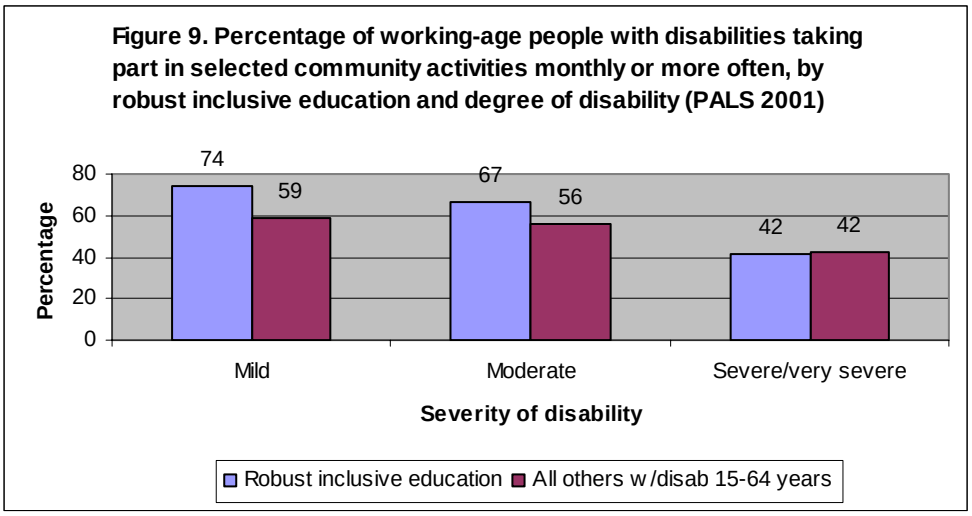
- have not attended special education schools or special education classes in regular schools; *and* where they:
  - did not begin schooling later than most people their age *and*

- did not experience their education being interrupted for long periods of time *and*
- did not take fewer courses or subjects than they otherwise would have *and*
- did not take any courses by correspondence or home study *and*
- did not have to leave their community to attend school *and*
- did not take longer to achieve their present level of education.

Where such criteria were met we considered people to have been welcomed and supported in regular classrooms in regular schools in their home communities and to have moved through the formal educational process with their age peers without major incident.

The comparison group was people with disabilities aged 15 to 64 years of age whose educational histories did not meet all these criteria.

Controlling for severity of disability we found that people who had been through robust inclusive education arrangements were more likely to take part regularly in community activities (Figure 9). Community activities are defined as ones likely to involve contact with others aside from family and friends, i.e., hobbies outside the home, sporting or cultural events such as plays or movies, personal interest courses and visiting museums, libraries or parks. We considered people to be frequent participants if they took part in such activities monthly or more often.




People who had been through robust inclusive education were also more likely to be employed (Figure 10). Figure 11 shows the employment situation of young adults with cognitive/psychological disabilities compared with others 15 to 34 years with disabilities. Again, those who had been through robust inclusive education arrangements were more likely to be employed.

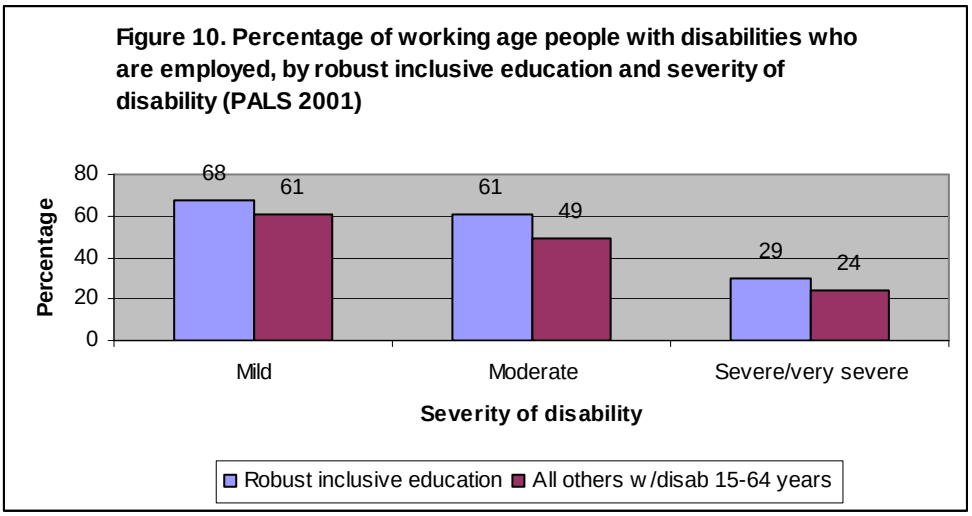
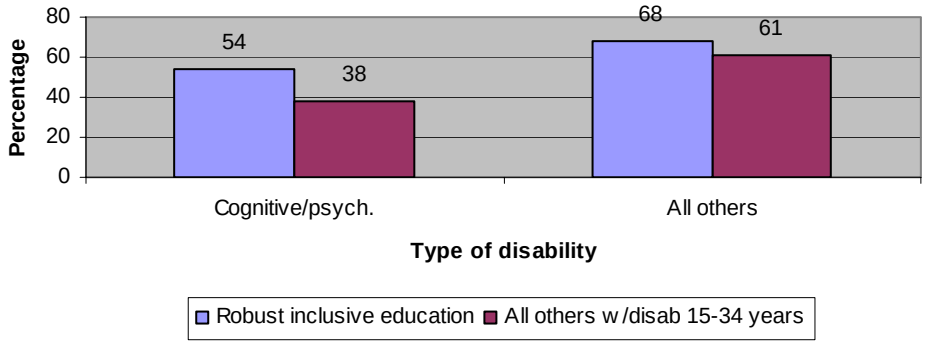


**Figure 11. Percentages of people with selected disabilities who are employed, 15 - 34 years, by robust inclusive education (PALS 2001)**



## V. Gaining Knowledge about the Present Situation of Students with Intellectual and Other Disabilities

Several factors make it quite difficult for researchers and others to develop a clear picture of the present educational situation of students with intellectual and other disabilities in Canada.

These factors include that Canada is a large country with decentralized responsibilities for education programs and educational statistics, the lack of focus on disability in administrative data systems in provincial and territorial systems, the lack of detailed focus on education and disability in most major statistical surveys, the cost of developing specialized surveys, problems of sampling bias in statistical and other methodologies, difficulties in generalizing on the basis of case studies and self-reported observations by parents, the general scarcity of research on issues of disability and inclusive education in Canada, the infrequency of provincial/territorial evaluations and other research, and the lack of comparability between provincial/territorial reviews of special education.

### A. Administrative Data

Canada is a large country and educational services are highly decentralized. Except for First Nations communities and people in the armed forces, education generally falls the within the jurisdiction of provinces and territories; there is no national government department with overall responsibilities for elementary and high school education or that serves as a counterpart to provincial/territorial ministries of education.

Aside from ministries of education, hundreds of district school boards have a significant role in policy development, resource allocation and in informing practice at the community school level, as do school principals and parent-teacher associations across thousands of elementary and high schools. Teachers' associations and advocacy organizations led by parents of children

with disabilities also inform the policy process. University-based teacher education programs, which operate independently from one another, also have a bearing on policy priorities in that pre-service and in-service programs shape the thinking of educators, who in turn participate in the policy process through their professional associations.

Canada's highly decentralized system of education creates significant challenges to gaining knowledge about policy, programs, school and classroom practices, numbers of students by various statuses (e.g., visible minority, male/female, disabled, etc.) and how students are faring in the country taken as a whole.

While there are national organizations that link interested parties in education across provincial and territorial boundaries, the only governmental organizations that operate in such a capacity are the Council of Ministers of Education, Canada (CMEC), the Canadian Education Statistics Council (CESC) and the Canadian Council on Learning (CCL).

Ministers of education established CMEC in 1967. The CMEC is a forum in which ministers of education discuss issues of mutual concern, consult and act on matters of mutual interest, and cooperate with national education organizations and the federal government. CMEC also represents the education interests of the provinces and territories internationally.

The CESC governs the Canadian Education Statistics Program, a joint initiative of CMEC and Statistics Canada that was established under a Protocol originally developed in 1989.

The themes of Diversity and Equity, and Special Needs Programming, are priority research areas for the CESC (CESC, 2005) and high quality research and presentations have been done in these areas under the CESC auspice. However, the pieces of research and analysis under CESC with a focus on disability have been few and infrequent.

CMEC recently completed an unpublished "Synthesis of provincial and territorial survey responses" for a recent special session it convened on inclusion/special-needs education. It draws from reports – which are also

unpublished – that all provinces and territories provided except Ontario (cited in Tobin Associates, 2004: 74-77).

The Canadian Council on Learning is a new federally sponsored organization that will coordinate research, disseminate findings and link stakeholders in education (CCL, 2005). Knowledge centres are being developed that will place a focus on adult learning in Atlantic Canada, early childhood learning in Quebec; work and learning in Ontario, Aboriginal learning in the Prairies, Northwest Territories and Nunavut; and health and learning in British Columbia and the Yukon. Presently, the learning of people with intellectual or other disabilities is not an explicit focus of the CCL.

For their part, provincial and territorial ministries of education use quite different approaches in their own annual reporting on education. Typically, reporting is at a high level of generality with little specific information on children with disabilities or other 'exceptionalities'.

In part, this provincial/territorial information gap is due to the fact that detailed information that is usually available at the school level about students (e.g., age, type of disability or other educational challenge, nature of programming, grades) is seldom 'rolled up' in summary form for analysis at the provincial/territorial level. International organizations such as the Organization for Economic Cooperation and Development (OECD) have had difficulty securing *any* provincial/territorial data on education arrangements in Canada for students with disabilities. For instance, only Alberta, British Columbia, New Brunswick and Saskatchewan have participated in the "Students with Disabilities, Difficulties, Disadvantages - Statistics and Indicators for Curriculum Access and Equity (Special Educational Needs)" project, which is being managed by the Centre for Educational Research and Innovation (CERI) at the OECD. The project aims to develop comparable statistics and indicators on students with disabilities, learning difficulties and disadvantages (SENDDD) to inform national and international policy-making (OECD, 2005).

## B. Surveys

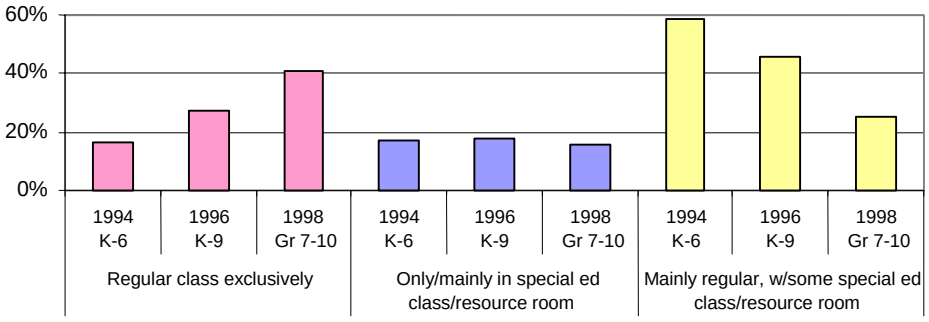
Major population surveys present difficulties to gathering information on the educational situation of students with developmental and other disabilities. General population surveys from Statistics Canada (e.g., Canadian Community Health Survey; the Census) usually tell little if anything about particular kinds of disability and little about the educational arrangements of school students.

Use of surveys that are not specific to disability but that do include questions on disability and education (e.g., the National Longitudinal Survey of Children and Youth – NLSCY) run up against the issue of sample size. The unweighted disability sub-sample is only about 1,000 or 2,000 cases, depending on the reference year. In the most recent data release the sub-sample of respondents classified as having intellectual disabilities is fewer than 100 cases.[4] The latter sub-sample size can make it very difficult to conduct meaningful analysis and meet Statistics Canada's data confidence requirements for publication. Further complicating matters is that the NLSCY education component has been suspended. That component surveyed teachers and principals and yielded a wealth of information about school and classroom practices.

Having said this, the NLSCY does provide information that is of some use. For example, Figure 12 shows the general trend towards regular classroom placements for students with disabilities and a trend away from mixed arrangements involving a combination of regular and special education placements. The proportion of students with disabilities who are exclusively in special education arrangements (excluding special schools) has remained fairly constant over the reference years.

[4] The NLSCY uses the term "mental handicaps". See the code book for variables DHLCQ45G and DHLYd15I. Statistics Canada (2003b).

**Figure 12. Movement twds inclusive education for pupils receiving additional assistance because of disability, showing percentages in various educational arrangements**
**Source: The Roeher Institute based on NLSCY (1994, 1996 & 1998 data)**




Disability-specific surveys such as the Participation and Activity Limitation Survey (PALS) ask some questions about educational arrangements but provide limited detail in this area and have historically occurred infrequently (every 5 or 10 years). PALS allows for comparison of people with and without disabilities in terms of highest level of education attained. However, it does not facilitate comparing the educational situations of students with and without disabilities as the survey does not ask detailed questions about the education of non-disabled students. In the most recent PALS Public Use Microdata File for adults, which includes 5 year age cohorts for people15 years and older, Statistics Canada has suppressed the variable on intellectual/developmental disability. The PALS survey of children (birth to 14 years) will not be made available as a public use file.

Despite these limitations, section IV of this report shows that PALS provides some useful information on education that can be drawn upon.

It would be a potentially costly and time-consuming undertaking for a non-government organization to custom-design and then administer a broadly based survey with a range of detail on the education of students with and without disabilities. Such an undertaking would also present considerable risks of sampling bias (i.e., over-counting respondents possessing selected characteristics and under-counting other respondents).

As well, to develop annual or semi-annual progress reports based on a custom-designed survey would involve replicating the survey year after year, which would further drive up the costs for the organization undertaking such work.

### C. Direct Observation and Reporting by Parents and Children/Youth

An approach to gathering information and generating knowledge that relies on the observations and opinions of parents and young people can produce interesting findings. Such an approach, however, raises issues of how to gather and organize the information on a frequent basis, whether the people included are representative of the population generally (e.g., to avoid sampling bias), the cost of data gathering and data processing, and the status of the knowledge gained (e.g., it is open to the criticism that it is ‘anecdotal’ or lacks credibility on other grounds).

The NLSCY is a well-designed survey that contains modules that ask children 10 years and older about their schooling and other experiences. It also asks a range of questions of parents, some of which are about the child’s school and experiences at school.

### D. Expert Consultations, Seminars and Symposia

Annual or semi-annual consultations or seminars/symposia that bring together knowledgeable people to provide their views on the status of inclusive education can be useful sources of information. To allow for analysis of trends, however, the seminars would have to be conducted periodically, would ideally have a core panel of people who participate across reference years, would ensure proper geographic coverage (e.g., people from several sub-regions in more heavily populated provinces; people from all provinces and territories) and would ensure that the people and perspectives represented at the table are representative of knowledge holders broadly speaking.

Concerning the latter point, there is a risk that the emphasis in data analysis will be accorded to the views of the most vocal participants in the consultation process, even though those views may not be indicative of the general educational situation and experiences of students with developmental or other disabilities.

### E. Case Studies

Case studies, while useful in providing a wealth of detail on specific individuals, again raise issues about whether the children and youth at the centre of the research are representative, the cost and time required for data analysis and report writing (e.g., because of the sheer volume of information that may need to be processed) and the extent to which research results can be generalized (i.e., the sample sizes are usually quite small).

### F. Comparative Research

Comparative research allows for the analysis of one group's situation in view of another group's (e.g., the educational situation of young people with disabilities compared with that of young people without disabilities). Typically, this kind of research relies heavily on surveys and statistical analysis, which can be problematic for the reasons already discussed.

### G. University-based, Independent and NGO Research

A review of research being conducted by university-based and other researchers could yield a meta-analysis that would allow a broad picture to be developed of the present situation of students with various disabilities in the educational system. Unfortunately, however, there is very little such research on inclusive education in Canada to review – not enough to produce a reasonably

full picture of inclusive education arrangements by province and territory on an annual basis.

### H. Provincial/Territorial Special Education and Other Reviews

Provincial/territorial ministries of education and other authorities (e.g., Human Rights Commissions, Provincial Auditors) occasionally lead formal assessments of educational arrangements in their respective jurisdictions. While these reviews provide useful information, they typically occur infrequently and use different approaches and analytic categories that again make it difficult to piece together a picture of arrangements with detailed comparisons across jurisdictions.

### I. Review of Policy and Program Documentation

Provincial/territorial legislation and regulations, and policy and program documents, are the main sources of some information. However, several important issues need to be addressed, here, including the data analysis framework to ensure comparability of analytical approach across jurisdictions and measures to ensure that two or three reasonable and well-informed people will come to similar conclusions about the nature of the information contained in the documents (i.e., inter-reviewer reliability).

# VI. The Present Situation

## A. The Approach Adopted in this Paper

Given that Canadians are hampered in obtaining information and knowledge about the educational situations of young people with intellectual and other disabilities in this country, the remainder of this paper adopts a composite approach to providing a general picture. It draws from statistical data, expert seminars, provincial special education reviews and other reviews and assessments. Statistical data include the National Longitudinal Survey of Children and Youth (NLSCY) and the Participation and Activity Limitation Survey (PALS).

One of the expert seminars drawn upon was co-sponsored by The Roeher Institute and the Canadian Research Institute on Social Policy (CRISP). It focused on the state of research into inclusive education in Canada (Roeher Institute, 2003c). The other seminar was co-sponsored by The Roeher Institute and the University of Calgary. Its focus was teacher preparation and professional development (Roeher Institute, 2003d).

Provincial reviews of special education services were consulted as well (Alberta Learning, 2000; Office of the Auditor General of Ontario, 2001; Ontario Human Rights Commission, 2003a; 2003b; Proactive Information Services Inc., 1998; Saskatchewan Special Education Review Committee, 2000; Siegel & Ladyman, 2000), as was a recent pan-Canadian review of educational issues which placed some focus on the education of students with ‘special needs’ (Tobin Associates, 2004 ).

Other papers that were consulted were by researchers from Canadian universities and research organizations who have placed a focus on the education of students with disabilities. The researchers are cited throughout the paper.

While there is a substantial amount of descriptive information about legislation, policies and recommended practices (e.g., see Proactive Information

Inc., 1998, pp. 154 – 203), there is relatively little research into actual classroom and administrative practice in inclusive education in Canada. Key themes that emerge from the review of the research and other sources in Canada are the tension between ‘inclusive’ and ‘special’ education; the ‘excellence – equity dilemma’; issues around vision and policy commitment on inclusion; processes for disability identification/assessment and student placement; individual program planning; parental involvement and status in the educational process; parental appeals of placement and other decisions; issues of funding, resource allocation and management; issues of accessing disability supports; roles and responsibilities of school staff; and teacher pre-service preparation and professional development.

Other important matters that are not explored in much detail in the Canadian literature or in the present paper include issues of school culture, expulsion policies, transition planning, measures for communicating and accessing information about best practices; the purpose and focus of accountability measures; student testing and evaluation; and student certification upon graduation.

### B. Shift to Inclusion

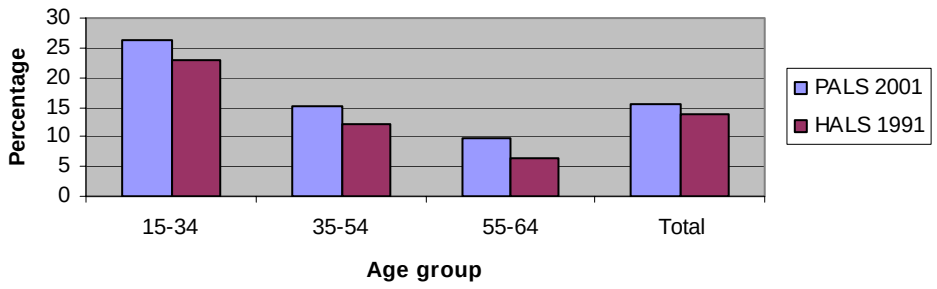
Statistical data from the NLSCY (Figure 12) indicate that there has been an increasing shift in recent years to regular classroom placements for students with disabilities, and a shift away from a mix of regular and specialized placements. Yet a fairly consistent proportion of students with disabilities continue to be placed mainly or exclusively in separate special education classrooms (See also Tobin Associates, 2004).

A higher proportion of young adults with disabilities experienced a robust model of inclusion as discussed in section IV of this report than was the case among older people (Figure 13). This finding points to positive changes that have occurred in recent years to facilitate the inclusion of students with disabilities in

regular classes and schools and to ensure that the other supports that are needed are in place.

Data from PALS 2001 and its forerunner, the Health and Activity Limitation Survey (HALS) of 1991, are not comparable strictly speaking; Statistics Canada has suggested that PALS may have focused on a group of people more severely disabled than HALS (Statistics Canada, 2002a). Nonetheless, we undertook the same line of analysis with HALS as we pursued with PALS. The results were similar: a higher proportion of young adults with disabilities experienced a robust model of inclusion than was the case among older people (Figure 13).

**Figure 13. Percentages of people with disabilities before completing school, who have been through robust inclusive education arrangements, by age group (PALS 2001 and HALS 1991)**




Given that PALS may have focused on people with a more severe level of disability than HALS, the findings are that much more interesting. A larger share people with disabilities15 to 34 years of age in 2001 had experienced robust inclusive education arrangements than was the case when HALS was conducted in 1991. This finding again suggests that there has been progress in making supportive and inclusive educational arrangements more available in recent years.

By the same token, however, further progress is needed. Among working age people who have only been in regular classes and schools, only 56% had been in educational arrangements that met all the criteria of robust inclusion.

This suggests that regular classroom placement is not in and of itself a guarantee that needed supports will be in place.

### C. The Difficulty of 'Doing Inclusive Education' in a Special Education Context

Lupart (1998) has pointed out that, while the philosophy of inclusion is becoming more widespread, "innovations have tended to be piecemeal and fragmented" (p. 253) and the special education model continues to prevail. Running parallel to notions of inclusion, "traditional special education programs have been fashioned according to the medical or deficit model, which assumes functional limitations and emphasizes student classification, standardized assessment, and separate, remedial intervention" (p. 253). Given that the publicly funded special education system has been in place since the early 1960s in Canada, generations of regular educators' competence and commitment to deal with student diversity in the regular classroom have systematically decreased.

The two regular and special education models have resulted in the creation of separate bureaucracies, policies and procedures, with each system having its own funding and professional networks and incentives for maintaining the *status quo* (Lupart, 1998). Thus, said Lupart, "The very success of this special education model poses the greatest barrier to inclusive education" (p. 254).

### D. Excellence and Equity in Education

The special and regular education systems evolved largely along separate paths in response to demands for change in the educational system, with special educators leading reform efforts to promote equity through progressive inclusion and with the general education system focusing on excellence based on teacher development and school effectiveness (Lupart 1998). This has led to what Lupart

called the “excellence/equity dilemma” (p. 9; see also Skrtic,1991). Lupart is of the opinion that, while most schools currently focus on one goal at the expense of the other, it is possible for both goals to be pursued simultaneously.

### E. Vision and Policy Commitment

While education policies in every jurisdiction across Canada back inclusion as a preferred option, there is a considerable distance to go to shift policies and practices from the special education model onto an inclusive footing. New Brunswick is furthest along in adopting a comprehensive model of inclusion; elsewhere there is no legislated requirement. Accordingly, the door is open for wide variation across local school districts and schools concerning how they interpret and apply provincial policies on inclusion (Lutfiyya & Van Walleghem, 2002).

Winzer (1998) wrote that, “philosophical acceptance… far outstrips commitment to implementation” (p. 231). From their reading of teacher files, Field and Olafson (1999) concluded that "school failure is located [by teachers] in the individual, with no consideration of the role of institutional or social factors” (p. 74).

At recent consultations on teacher education and research on inclusive education, The Roeher Institute found that variations in vision and policy commitment result in implementation of inclusive practice that is highly inconsistent even within a given province. Practice varies widely from school district to school district, across the English and French systems, across the public and Catholic systems and from school to school in the same community and system (Roeher Institute, 2003c; 2003d).

### F. Identification/Assessment and Placement

The educational system in most jurisdictions typically requires that students thought to have disabilities requiring services/accommodations, and

therefore needing dollars beyond those earmarked for the general student population, be formally assessed and categorized by professionals as having specific physical, intellectual/developmental, learning, emotional/behavioural, mental health or sensory disabilities. Once categorized as having a *bona fide* disability, decisions are then made about placement, that is, whether the student will be educated entirely within the regular classroom with or without supports for the student and regular teacher; whether the student will be educated in a special classroom; or whether the student will be educated in arrangements somewhere between these poles, such as in a mix of regular and special classroom placements.

The Saskatchewan review committee found that the way the notion of "most appropriate environment" is currently defined leads to overemphasis on which school or classroom the student should attend, rather than on what instruction they should receive. The committee found that, "In some cases, students are included but separate. There is a need to see children as diverse individuals, not as students with a disability label" (Saskatchewan Special Education Review Committee, 2000, p. 93).

In most provinces, parents have a legislated right to be involved in the disability determination and placement process. While students in many jurisdictions *must* be diagnosed by a physician or other professional in order to receive higher levels of provincial public funding, there are exceptions to this rule, including in the Northwest Territories, where educational services for students with disabilities are reportedly based on identification of individual need rather than on categorization. Formal assessment is not required in New Brunswick, either (New Brunswick, 2002a, p. 5).

In British Columbia, Siegel and Ladyman (2000) took issue with the categorical approach to identification of exceptionality, which they maintained is insufficiently responsive to students' needs and diverts scarce resources away from directly supporting the needs of students. The researchers would rather see classroom-based, teacher-initiated assessments and immediate action rather than recourse to more formal assessments.

Similarly, Alberta Learning's (2000) special education review committee took issue with categorical assessment. The committee preferred an approach different to one that uses specific labels or categories because the complex needs of some students can defy adequate description by a single label. The committee made the point that the labelling process tends to focus on students' deficits while ignoring strengths, "creating an unbalanced picture of the student" which may even result in misunderstanding among people not well-versed in what specific diagnostic labels mean (p. 22).

The Saskatchewan review committee's report (2000) asked the question, "How can children's needs rather than [categorical] designation become the basis for PPP [Personal Program Plan] development?" (p. 47). The review in Manitoba characterized the process as adversely affecting the students themselves – "the use of labels, and focusing on the negative aspects of the student [are] detrimental to the student's future development" (Proactive Services Inc., 1998, p. 318).

The Ontario Human Rights Commission (OHRC) (2003) brought attention to problems with the labelling of students as a means of securing funding for accommodations, stating, "Some have raised concerns that the accommodation process… and in particular the process for accessing ISA funding, encourages labelling of students… rather than assessing the individual needs and strengths of each student (p. 18)." 'ISA' means Intensive Support Amount, that is, additional funding to address disability-specific needs in education.

The Commission found that student labelling during assessment of eligibility for ISA funding may "result in pre-determining accommodation on the basis of stereotypical assumptions" (OHRC, 2003, p. 30). The commission expressed a concern that students' needs may be oversimplified, their strengths reduced by a fixed categorical designation and their progress overshadowed by paternalistic attitudes. The Commission was told that students receiving ISA funding are often referred to as "ISA kids," and therefore "identified more by their

[5] In research of arrangements in Ontario, Weber and Bennett (1999) relate in an ethnographic study how various professionals within and beyond the education system had labelled a particular student as "autistic, ADHD, learning disabled, cerebrally dysfunctional and mentally disabled".

disabilities than by their individual characteristics" (p. 31). Community Living Ontario called ISA funding "seriously flawed" and "a crude and highly suspect approach at best" (Driscoll, 2002).

The report of Nova Scotia's Special Education Implementation Review Committee (2001) recommended a change from deficit-based assessment to identification of "both the strengths and needs of students, with a concomitant appreciation of the diversity of their strengths and needs" (p. 33), accompanied by earlier identification and assessment in order to enhance preschool-to-school transition. As well, the committee was of the view that assessments lead to recommendations for programming that continue to be based too heavily on a medical model of disability.

Such problems with the student 'labelling' process are aggravated by assessments that are continual. The Alberta review committee (2000) found that students are often submitted to repeated assessments. It called for a single point of entry (preferably based on a coordinated system of pre-school identification and assessment) as well as for safeguards to protect the information that is collected. The committee observed that some provinces have initiated a "portfolio system" for parents to maintain and provide to school staff upon their children's school entry. This may help to reduce service fragmentation and unnecessary reassessment. Manitoba's Special Education Review committee also pointed to repeated diagnoses as a problem (Proactive Information Services Inc., 1998).

For all the effort invested in the assessment process, placement decisions may be quite inappropriate. For instance, Field and Olafson (1999) noted that three out of eight students in their study had been placed in resource rooms yet "showed no evidence of learning disability in recent testing" (p. 74).

Then there is the matter of who is to conduct the assessments. The review committee in Alberta (2000) identified the shortage of qualified assessment professionals, especially in rural areas, and pointed to problematic waitlists. Similarly, Manitoba's Special Education Review cited a shortage of assessment professionals and long waitlists (Proactive Information Services Inc., 1998). Moreover, having to drive to Winnipeg for assessments is a major inconvenience

for people living in isolated areas; the review committee characterized many regions of the province as generally lacking “special needs programs and support services” (p. 319). The Nova Scotia committee (2001) suggested that the waiting periods for assessments could be addressed by hiring more assessment personnel and improved by multi-site assessments that would include the use of non-medical assessment professionals (e.g. social workers).

Speaking more generally, Lupart (2000) found that students typically must be categorized in order to receive specialized supports and instruction; there is often a significant time lag between referral/assessment and programming change; and identification and testing take up an “inordinate proportion” of available funding (p. 7).

### G. Individual Program Planning

Once a student is identified and placed, an individualized education plan (IEP, known variously as an individual program plan – IPP, individual support services plan – ISSP, etc.) is typically created. This plan usually maps out what learning progress should be made in the year, the process of evaluation and review to determine progress, and adaptations, accommodations and other measures the student will require.

The goals set out in the IEP may serve as a basis for reporting on the progress of students who are not expected to follow the standard curriculum. For students who are expected to progress under the regular curriculum, the IEP may simply state the accommodations/ adaptations, services and supports needed in order for the student to meet standard curriculum goals. In some provinces IEPs are not needed for students with disabilities who follow the regular curriculum.

Siegel and Ladyman (2000) pointed out that, in British Columbia, IEPs tend to serve funding and auditing processes rather than the “critical planning purposes” for which they are intended. Audits are conducted of the classification of students and provision of programs instead of on whether educational

outcomes are being achieved. The researchers argued for audits of programs and of student progress rather than the present system, which they characterized as “time consuming, expensive, and unnecessarily complicated” (p. 25). They made the point that in some cases IEPs are simply not implemented. At a recent symposium on teacher preparation co-sponsored by The Roeher Institute and the University of Calgary, participants were told that regular education teachers in BC are beginning to resent the pulling of supports from the classroom and some regular teachers are unwilling to go to IEP and other meetings if they feel these won't make any positive difference in the classroom (Roeher Institute, 2003d).

More generally in Western Canada it was observed at the symposium that responsibility for developing IEPs has been “downloaded” to classroom teachers, who typically lack background on teaching students with disabilities and who seldom have the required 8 to 24 hours to develop an IEP. The supports that teachers need are typically not in place and school districts have different approaches to dealing with planning issues, which have not been well researched.

The review committee in Nova Scotia (2001) rated the planning process highly where there is strong leadership from principals, administrators and teachers – particularly when school-based teams are strongly supported by principals. This effect was even greater for schools where principals had “resource backgrounds”, that is, experience in issues of instruction for students with disabilities. Availability of procedural planning guidelines reportedly increased the clarity of the individual planning process.

The Saskatchewan review committee (2000) expressed positive views about the Personal Program Planning (PPP) process in that province. The report indicated the importance of keeping parents and other stakeholders involved over the long term. The committee indicated that the planning process could be improved by increasing the focus on student needs for assistive technology and on transition planning. The Saskatchewan committee suggested that the Personal Program Plan be used as an accountability mechanism, with student

attainment of a set of goals as the guiding indicator of student progress. The review committees in Alberta and British Columbia expressed similar views.

### H. Parental Involvement and Status

The literature generally points to the marginal status of parents in the education of children with disabilities and the considerable time and advocacy effort that parents are required to invest. Siegel and Ladyman (2000) reported that parents in BC feel “excluded from the IEP planning, that their suggestions are not seriously considered, or that the IEP agreed upon is not implemented. It was clear that parents of students with special educational needs want to be more involved in their children’s education” (p. 31).

The Alberta Special Education Review reported that parents may not be aware of the existence or necessity of an Individual Program Plan. Within the context of the strong parental choice movement in Alberta, the committee reported that “many parents of students with special needs do not have an equal choice in placement and program decisions affecting their children. Parental choice for students without special needs is more respected and accommodated than parental choice for students with special needs” (Alberta Learning, 2000, p. 32).

The Saskatchewan report (2000) pointed to positive developments where parents are involved in the individual planning process. However, the report stated that the “extent of family involvement in program planning and evaluation differs across schools and school divisions” (p. 142).

The Ontario Human Rights Commission’s report (2003a) described a system that requires a large amount of parental advocacy for the supports their children with disabilities need in education. The Commission quoted the Ontario Provincial Auditor as saying, “The ability of parents to advocate for their child is variable depending on how well informed they are about available services and supports” (p. 131).

Nova Scotia's review committee (2001) found that many parents expressed frustration with their involvement in the identification, assessment and program planning processes. The committee recommended the use of communication logs between parents and teachers to address this problem.

### I. Parental Appeals

Disability determination and placement decisions can be contentious and in most jurisdictions parents have the right to appeal these decisions. Appeals processes are not without difficulties, however.

The Alberta committee (2000) characterized the appeals process as "time consuming and emotionally draining, as parents must go through too many levels of bureaucracy before being able to appeal to the Minister" (p. 43). There is also a lack of information about parents' right to appeal and about what they can expect from the appeals process. The review committee in Saskatchewan (2000) found that parents are uninformed and/or unsure about their rights and responsibilities in engaging the appeal process (p. 142). Manitoba's review (Proactive Information Inc., 1998) pointed to the vagueness of formal provisions around appeals and called for more publicly available detail on the process (pp. 263, 458).

During the Ontario Human Rights Commission's (2003a) consultations, many groups expressed reservations about the Identification, Placement and Review Committee (IPRC) process. Many comments focused on the appeals process and the lack of an effective dispute resolution mechanism. While parents can appeal identification and placement decisions, there is no appeal process for decisions concerning specific programs and services. As well, the existing appeals process is "cumbersome, time-consuming and overly litigious" (p. 34). Decisions on primary appeals to a Special Education Appeal Board are not binding on school boards, and the combination of primary and secondary appeals (to a Special Education Tribunal), with the addition of a possible judicial review, can last well into the school year. Whether because of delays in

assessment, placement, review, or preparation and implementation of IEPs, students may have to wait for classroom spaces to open or for Intensive Support Amount applications to be processed. All of these delays can act as disincentives for parents to seek legal appeal. While parents may not agree with identification or placement decisions and may be dissatisfied with the services their children are receiving, parents may simply accept the situation because they cannot afford the additional time and effort the legal process would involve. Nova Scotia's review committee (2001) pointed to the need for measures to resolve disputes around individual planning before these escalate to the point where parents feel the need to resort to formal appeals.

## J. Funding, Resource Allocation and Management

Disability assessment is linked to funding and resource allocation in that it serves as a means for justifying the allocation of additional financial resources. The present section provides an overview of funding arrangements in each of the provinces and territories and a discussion of key issues that emerge from the literature around funding, resource allocation and resource management.

### General Funding Arrangements

In British Columbia funds are distributed through a student base allocation, with additional funding through 5 types of supplementary grants to students with disabilities, including the Supplement for Unique Student Needs, which is divided into 3 levels (BC Ministry of Education, School Funding and Allocation Branch, 2003).

In Alberta, basic instructional funding is provided for all students from grades 1-12, including students with mild and moderate disabilities. School boards are expected to pool special education funding and allocate it to schools to meet the needs of students with special needs. Separate funding is provided to students who are considered unable to attend or benefit from a regular program and who receive instruction through an outreach program. Additional

funding is provided for students with severe disabilities based on an established profile of the jurisdiction that includes historical data of the numbers of students with severe disabilities, provincial patterns of overall growth in student enrolment and projections for growth in the numbers of students with severe disabilities. Evidence of students having severe disabilities is based on assessment and diagnosis by “qualified personnel,” the presence of Individualized Program Plans and other criteria. Funding is also provided for the transportation of students with severe disabilities who are funded through Severe Disabilities Funding (Alberta Ministry of Education, 2002).

Saskatchewan’s Foundation Operating Grant provides funding for a number of special education categories, including: Diversity Factor Recognition, Designated Disabled Program Funding and Technical Aid Cost Recognition (Saskatchewan Learning, 2004).

Manitoba provides extra funding to students deemed eligible, that is, students who meet the criteria of levels 1 through 3 of severity of disability. Base support includes an amount for “level 1 special needs” (the lesser of $265 per eligible student or allowable expenditures as reported under Library/Media Centre on the Calculation of Allowable Expenses Schedule in the 2003/2004 financial statements) on top of base instructional support that ranges from $1,745 to $1,785 per student (Manitoba Education and Youth, 2003)

Similar to the Manitoba system, primary and secondary education in Ontario is funded through the Foundation Grant (nearly $8.11 billion in 2003-04), which supports classroom teachers and assistants, textbooks, computers and supplies, administration, library and guidance services, professional and paraprofessional services and other basic services available to all students. For exceptional students and other students who are deemed to need special education programs and supports, the Special Education Grant – consisting of the Special Education Per Student Amount (SEPPA – $810.5 million in 2003-04) and the Intensive Support Amount (ISA -- $839.1 million in 2003-04, including $1.5 million for the Special Incidence Portion [SIP]) – is the funding source. Also included in grants to school boards are allocations such as language-related

funding, continuing education, administration, etc. (Government of Ontario, 2003).

The Quebec education budget includes allocations for basic services such as vocational education and student services for students with special needs or who are “at-risk.” Funding is distributed based on school board enrolment on September 30 of the previous school year, and categories of enrolled students (e.g. students who do or do not have disabilities) are allocated different per-student amounts. A dedicated amount is provided for special education, i.e. funds can only be spent on special educational services (Quebec Ministry of Education, 2002).

While no budget documents outline specifically how much will be spent on special education in New Brunswick, services for gifted students and students with disabilities are funded by a $385 per-student grant on top of regular in-year funding. This grant is based on total enrolment in the previous school year and is based on all enrolled (rather than enrolled disabled) students. Total student enrolment in 2001-2002 was 122,792 (New Brunswick, 2002b).

Funding in Nova Scotia is based on school board enrolment from the previous year and is distributed though base funding for all students as well as a special education grant based on total student enrolment (rather than number of students with special needs). The special education grant is to be used for services that are needed in addition to regular teacher time (Nova Scotia Department of Finance, 2003).

In Newfoundland and Labrador, $3,708,500 was budgeted for Student Support Services in 2003-04. Student Support Services has responsibility for: special education programming; guidance services; student retention; speech and language services; itinerant services to children who are deaf or hard of hearing and blind or visually impaired; educational psychology services; and the Newfoundland School for the Deaf. This figure also includes contributions to the Atlantic Provinces Special Education Authority; $982,200 of the almost $4 million goes toward students in public schools. The majority of the rest is allocated to two special schools, i.e., the Newfoundland School for the Deaf, and a school in

Nova Scotia for students with visual and auditory disabilities (Newfoundland and Labrador Treasury Board, 2003).

For the 2002-2003 school year, Prince Edward Island's Minister's Directive No. MD 2002-03 ("School Board Staffing and Funding Program for the 2002-2003 School Board Fiscal Year") outlines the rationale for distribution of funds. While there is no discrete category for 'special' or 'inclusive' education *per se*, the Directive specifies funding for personnel required for delivery of special education services to students with special needs (Prince Edward Island Department of Education, 2002).

Nunavut schools are organized under three Regional School Operations Offices and are administered directly by the Department of Education. Funds flow from the Ministry, to the Regional Offices, to District Education Authorities, which represent individual communities. The funding formula is based on a number of communities within each region as well as full-time enrolment (Data Probe Economic Consulting Inc., 2002).

Educational funding in the Northwest Territories is administered through five Divisional Education Councils, two District Education Authorities and the Francophone School Commission. Funds are distributed according to seven major categories – one of which is "inclusive schooling" – and are based upon school enrolment on September 30 of the previous school year. For small schools, funding may be based on grades offered rather than number of students (Northwest Territories Department of Education, Culture and Employment, 2003).

Yukon's education funding is allocated according to the following categories: Administration; Program Delivery (remedial tutors and educational assistants) and Program Support; French Program; and Special Programs, including special education services such as speech/ language programs, psychological assessments, and occupational therapy (Yukon Department of Education, Public Schools Branch, 2003).

**Key Issues**

Key issues around funding, resource allocation and resource management are the cumbersome process, administrative burden and the inadequacy of resource allocation in relation to student needs. Present approaches are restrictive; can include repeated assessments; and typically involve categorical approaches that create incentives for schools and districts to label students in the interests of securing additional funding. While funding arrangements for the education of students with disabilities vary considerably from jurisdiction to jurisdiction, essentially provinces use a combination of base funding for regular education plus supplementary grants or other funding measures to address the additional service and support needs of students with disabilities and other 'exceptionalities'.

Siegel and Ladyman (2000) stated of arrangements in British Columbia that "the current funding system does not promote effective early identification and pre-referral intervention and encourages the system to spend resources on more expensive forms of assessment" (p. 25). The researchers took issue with the practice of applying targeted special education funds to cover indirect expenditures such as class size reductions and administrative costs; they also found inconsistent fiscal practices between districts. They made a strong statement about schools wasting time on excessive bureaucracy. The authors suggested that school boards should consider retaining some of the presently targeted funds as a contingency to provide district- or regional-level services for specific programs. The Roeher Institute (2003d) reported the view of participants at an expert seminar on teacher preparation that the time-consuming system used to code students for the purpose of receiving funding provides incentives for schools to code as many students as possible to maximize funds (see also Crawford & Porter, 1992; Owens, 2003; People for Education, 2002).

The Alberta Special Education Review (Alberta Learning, 2000) characterized the process and administrative requirements around Severe Disabilities funding as too time consuming and costly. The review made the point that repeated assessments draw funding away from direct student programming

and services and suggested that districts should instead change to a needs-based system of assessment “for programming purposes only” (p. 15). The review argued that Alberta Learning, in collaboration with school jurisdictions, should establish individual profiles of each district that include historical data on the pattern of growth over the past five years of students with severe disabilities, numbers of students with severe disabilities served and projections for future funding. According to the committee, this system would have the additional benefit of providing for smoother transitions into school, from grade to grade, and from school to school. While the provincial ministry followed this suggestion, students must still be assessed and diagnosed for type and severity of disability. The Alberta report also stated that funding approvals often come too late in the school year, a problem noted by education critics in Ontario.

In the Manitoba Special Education Review (Proactive Information Services, 1998), members of the public raised the need for more funding and increased staffing. Several respondents noted that funding was inadequate for students assessed with Level 1 needs whose disabilities may not be “severe” but who nevertheless may need various services. There was a call for clearer and more appropriate criteria for funding levels, as children assessed in certain categories were believed not to be receiving supports and services appropriate to their needs. Further, universality and continuity were not being achieved; programming may be available in some areas of the province but not in others and may be provided one year but not the next. This was an issue particularly in northern communities, where funding may not be portable for students who are in transition between their home communities and larger population centres.

Members of the Manitoba public echoed concerns raised in other provinces that the amount of paperwork involved with applying (and re-applying) for funding was too confusing and time-consuming, and that the administrative process was taking funds away from direct service provision. Participants called for the introduction of multi-year funding for students with disabilities, and suggestions were made that individual education plans should be developed for longer duration than one year. Manitoba has in fact introduced multi-year

funding, as well as “multisystem” (i.e., intersectoral) funding for students with profound emotional/ behavioural disorders (Manitoba Education, Citizenship and Youth, 2003b).

The Ontario Human Rights Commission (2002) characterized the funding system for students with special needs as “complex” and reported that, from the perspective of stakeholders, many of the problems experienced by students with disabilities in accessing education are due to funding shortfalls (2003a). A similar analysis is provided by Gibson-Kierstead and Hanvey (2001). Shortfalls may result in delays, misidentification of student needs and a lack of necessary accommodations. The Commission concluded that “while school boards have a duty to accommodate students with disabilities, the Ministry of Education needs to supply adequate funding to school boards to allow them to provide this accommodation” (OHRC, 2003b). The Commission stopped short of defining what constitutes “adequate” funding.

A 2002 paper by the parent advocacy group, People for Education, argued that funding for students with special needs in Ontario is inadequate and that criteria are too restrictive for assessing student needs. The group contended that “the Funding Formula has created a triage system of special education in which only the most needy are served” (p. 1), with children with moderate needs put on waiting lists.

In Nova Scotia, the 2001 report of the Special Education Implementation Review Committee provided a short section on funding in the province that pointed to “the critical shortage” (p. 56) of funding for special education that the Funding Review Work Group had noted since 1996. The report indicated that the shortage affects all students, not only students with special needs. It recommended that the system receive additional infusions of revenue.

## K. Disability Supports

Young people may need various disability supports to enable them to participate as valued equals in regular education arrangements. Disability supports were defined and discussed earlier in this paper.

Present arrangements for the delivery of disability supports are complex. Essentially, however, provincial ministries responsible for health, education, children and families, and social services are all involved, as is Indian and Northern Affairs Canada and provincial authorities responsible for First Nations.[6]

With few exceptions, people interviewed and surveyed for recent Roeher Institute research indicated that such supports are vitally important (Roeher Institute, 2002; 2004). In its public policy efforts, the Council of Canadians with Disabilities (1999) has consistently placed emphasis on issues of disability supports since 1999. Key themes on disability supports that emerge from the literature on education are the inadequacy and inconsistency of provision, lack of coordination, delays and unsuitability to students' needs in many cases. Statistics Canada (2003a) recently reported that cost is the major factor that accounts for why people with disabilities in many cases lack the supports they need.

For many persons with disabilities, successful transitions depend on the *continued* availability of needed supports and services (The Roeher Institute, 2002). For instance, individual program plans would ideally include provision for students' movement through grades and school systems (e.g., from elementary to high school; public to private; English to French), and from school to work or to other activities after formal schooling. Literature in this area generally indicates that issues around transitions are similar to those for school-based supports and services more generally in that the adequacy tends to decline as students age (Roeher Institute, 2004a), particularly for students with intellectual disabilities, who face a severely restricted job market. However, even for other students with disabilities, the declining availability of supports combines with other factors to

[6] For high school students and working-age people, ministries responsible for labour market services are involved, as are Workers' Compensation programs, the Vocational Rehabilitation program of the Canada Pension Plan Disability benefit, as well as private and employer-based insurers and employers, both in the public and private sector.

create disadvantages after school leaving. These factors include unsupportive, inaccessible workplaces, insufficient education and training, and an income support system that contains a many disincentives to employment (see The Roeher Institute, 2001 and 2004; Freeze et. al., 1999).

Concerning the adequacy and coordination of supportive services, the Alberta review (Alberta Learning, 2000) found that “there are not enough personnel to provide services and little overlap between systems in practical application…. Services for students with special needs are not being provided in an integrated system of program delivery” (p. 36). In the Executive Summary of its 2000 report, the Saskatchewan Special Education Review Committee noted the inconsistency of support services and programs across schools and school divisions that result from over-reliance on school boards for policy interpretation. The Committee contended that a more centralized approach would yield greater consistency across the province and greater understanding of and adherence to the philosophical position and goals of the education ministry. In addition to emphasizing the need for continuing innovation in the provision of disability supports, the committee suggested that service provided across multiple schools and jurisdictions needs to be improved and supported through the building of local capacity. Similar measures at the policy/system and school levels are needed in order for coordination to work, namely shared policies and strategies, funding and other resources so that policies can be carried out, and in-service training and professional development so stakeholders can learn how systems and groups can work together.

Manitoba’s Special Education Review (Proactive Information Services Inc., 1998) found a shortage of professional services needed to support the education of students with disabilities, for example, in the areas of mental health, speech/ language, occupational and physical therapy. Parents who participated in Manitoba’s review reported that access to services and supports declines in relation to student age (see also Crawford, 2004). While more of a problem in rural/isolated regions, this challenge persists even in Winnipeg. In addition to the regular range of disability-specific supports that may be needed by students,

many recommendations brought attention to a need for more Aboriginal staff and for ESL and other programming that would be “more sensitive, fair and educationally relevant to the needs of First Nations students, their families and communities” (p. 335)

Although Ontario’s policy, legislative and program infrastructure is quite extensive, the Human Rights Commission (2003a) reported that “stakeholders continue to express concerns… [and] report that special education practices and procedures in school settings at the local level are not consistent with the Ministry of Education’s own directives…” (p. 14). These inconsistencies show up, for example, in barriers to physical accessibility in multi-level schools without elevators and ramps, inaccessible washroom facilities and play areas, and inaccessible laboratories and other learning facilities. The Commission pointed to insufficient access to necessary accommodations (e.g., classroom supports, adaptive technology, speech-language pathologists, alternative format materials) because of delays in the creation of Individual Education Plans that may not, in any event, reflect student needs or that may be ignored altogether. Children may not be able to begin the school year with their peers, or may be able to attend only part time due to the lack of appropriate supports and accommodations. In some cases students lose substantial school time due to disputes concerning appropriate accommodation (OHRC, 2002). Students whose behaviour may disrupt the classroom environment are reported as particularly affected by “rigid expulsion policies” (OHRC, 2002, p. 16). An indicator of the effects of these problems is the grade 10 literacy test, in which 60% of students identified as having special needs failed, compared to 25% of other students (OHRC 2003a).

People for Education (2002) reported regional inequities in Ontario in terms of access to psychologists, social workers and speech language pathologists. These inequities are most pronounced in the north and southwest of the province, with particular difficulties in remote and rural areas. The inequities are aggravated by the general decrease in access to such supports across the province since the 1999-2000 school year. People for Education’s characterization of the present system as one of “triage” is backed up by the

Ontario Provincial Auditor's observation that backlogged cases are dealt with according to a triage system with the less "serious" cases having a waiting period of between six to twelve months, if they are dealt with at all (OHRC, 2003a). The Human Rights Commission quoted the Provincial Auditor as saying, "Service decisions are being made based on budgetary considerations, and there is no basis for either school boards or the Ministry [of Education] to evaluate the appropriateness of the service cut-off points currently in place" (cited in OHRC, 2003a). It is not uncommon for parents to pay out-of-pocket to bypass waiting lists.

Nova Scotia's Special Education Implementation Review Committee (2001) recommended "interagency collaboration with community resources" (p. 33) and services, and a more team-oriented approach to supporting students with disabilities overall. Such an approach would be enhanced if school districts were to address the shortage of qualified professional supports such as school psychologists and qualified resource staff, and the difficulties in accessing the professional supports that are in place.

### L. Roles and Responsibilities of School Staff

The research literature points to role confusion concerning who is, or should be, responsible for educating students with disabilities - regular teachers, para-educators/teacher assistants, or both in some kind of collaborative arrangement. The research also raises questions about the competence and knowledge of teachers and teacher assistants in this area.

Teaching assistants can be detrimental if they create relationships with individual students that separate those students from the rest of the class. The Roeher Institute's (2003e) work to assess the inclusivity of special needs education policy addressed this issue in one of its benchmarking questions, "Is there a requirement that specialist resources are used to train and improve the capacity of teachers to meet their students' needs rather than [provide] direct support of students?" (Tables in section III Policy Scan, rows on Professional

Development and Specialist Resources). Hill (2003) discussed research on infrequent teacher interactions with students with disabilities. Interactions increased when an instructional assistant was more than two feet away from the student. Assistant "hovering" may result in the separation of students with disabilities from their classmates and interference with peer interactions. This hovering behaviour is more common among assistants who understand their role in the classroom to be that of having prime responsibility for inclusion and the academic success of the student with a disability and as being the expert regarding a particular student (Giangreco, Edelman, Luiselli, & MacFarland, 1997).

Siegel and Ladyman (2000) reported the concern of parents in BC that "teachers have relinquished their responsibilities for the education of their children to teacher assistants" (p. 18) and that the number of teaching assistants in British Columbia rose from 1,630 to 6,508 between 1990 and 1999, a Canada-wide trend. Hill (2003) reported that, despite the widespread use of instructional assistants, this practice is one of the least studied issues in special education. Siegel and Ladyman found that the training of teacher assistants is no better than that of teachers when it comes to disability awareness.

It has been reported of Saskatchewan that para-educators are doing most of the teaching of students with disabilities in that province (The Roeher Institute, 2003d). While the law requires that people who are qualified in special education do the teaching, para-educators are not required to take courses and often do not have enough days away from the job for professional development. Classroom teachers are not receiving much pre- or in-service training on how to work with para-educators. Some parents reported that children with disabilities were doing better when teacher assistants were on strike. To improve the situation of para-educators, the Saskatchewan Special Education Review Committee (2000) recommended the development of clear role and responsibility descriptions for teacher associates.

While much depends on how educational assistants carry out their role and not merely on the number and availability of such assistants, the Alberta

review (2000) found that more educational assistants are required for schools to assist in delivering programs, and that more professionals are needed to act as liaisons between home and school. Similarly, Nova Scotia's review committee recommended increasing the number of teacher assistants and the use of floating substitute teachers to facilitate teacher involvement in program planning in the early weeks of each year.

Winzer wrote of the operating context in education as one of "ever increasing demands" (1998, p. 231) on teachers, e.g., increased student variability and diversity, new management problems, increased resource and time restraints, larger class sizes, additional responsibilities and demands for accountability, diffuse obligations, formalization of curricula and testing, and the knowledge explosion that has to be addressed. Lupart (2000) provided a list of "gaps and limitations" in educational arrangements for students with "exceptional learning needs" (p. 7) that concretize the problems outlined by Winzer (1998). The limitations are that:

- school systems are ambiguous about regular class teachers being responsible for the learning progress of students with exceptional learning needs;
- regular class teachers are not adequately prepared, and are not provided with adequate supports, to manage inclusive classrooms;
- regular class teachers do not have sufficient time to consult with parents and special education teachers; and
- knowledge of the needs of students with disabilities is low among administrators.

It is little wonder Lupart found that teachers are generally not modifying their practices to accommodate the individual learning styles of students.

### M. Teacher Pre-Service Preparation and Professional Development

A recurring theme in the literature concerning teacher preparation for addressing issues of diversity, disability and inclusion in regular classrooms is

that very little systematic provision is being made for this in Canada. There are exceptions to the rule, but the programs that are in place tend to be dependent on the leadership of individual staff working for school districts and universities, and there is always the chance that a good program will be ‘here today, gone tomorrow’. As well, there are insufficient professional development days, insufficient resources for professional development, and insufficient incentives for educators to pursue pre-service training and upgrading on issues of inclusion and diversity (The Roeher Institute, 2003d).

Siegel and Ladyman (2000) stated, “Many of the teachers currently employed in British Columbia’s schools have not had the benefit of formal preparation for working with students with special educational needs. Indeed, many teachers expressed the view that they feel they do not have the knowledge they need to work with such students” (p. 17). That opinion was echoed at the consultation on teacher education co-sponsored at the Roeher – University of Calgary seminar on teacher education in March 2003 (Roeher Institute, 2003d). Participants in that consultation indicated that there is a need in BC to offer courses that will help teachers to deal with what they are already doing, instead of providing professional development courses that are “add-ons.” Fragmentation of Ministry and District support for professional development is reportedly making teachers desperate for information. Itinerant teachers are not as available as previously to provide even the most basic information to teachers on instructional issues and the positions of well-trained specialist support teachers are being eliminated. People moving into the specialist teacher role may have very little background on issues of disability and inclusion and tend to move on to other positions once their preferred job postings become vacant. While in some cases they may become department heads, they tend to lack the expertise needed to help the other teachers, which is resulting in considerable frustration for regular educators.

Concerning people doing sessional work at the University of British Columbia, it was reported, “There is no real consistency. The courses depend on

who's teaching and the overall approach is very haphazard (Roeher Institute, 2003d, p. 4)." This was acknowledged as a problem in other jurisdictions as well.

The Campus Alberta Inclusive/Special Education Initiative (CAISEI) (2002) referred to the "merging" of the regular and special education systems in Alberta, and to the trend of specialized programming being provided in regular rather than segregated settings. These and other developments have driven changes in the education of future teachers, including the provision of 'special needs-related' instruction for all school staff, rather than only for special education teachers. CAISEI holds the opinion, however, that "professional development opportunities at Alberta universities have not kept pace with the growing demands" (p. 3). This has been the case particularly for professionals practicing in rural and isolated areas, and for those with personal and family obligations that prevent them from undertaking rigidly scheduled professional development courses.

The University of Calgary has had some success in designing a program that integrates academic knowledge with experience in the field, although secondary school teacher candidates reportedly still do not get much exposure to students with disabilities. At the University of Alberta, all education students must take a general course on 'special needs', which includes information about inclusive practice. However, according to a participant at The Roeher Institute – University of Calgary symposium on teacher preparation, "Piling course on course hasn't done much to ensure that people have the knowledge needed for actual use" (The Roeher Institute, 2003d, p. 5).

Although not as much of an issue in Winnipeg and Brandon, members of the public who participated in Manitoba's Special Education Review (Proactive Information Services Inc., 1998) reported that "clinicians, teachers, resource teachers, and support staff need increased training and professional development". Teacher preparation in Manitoba involves a two-year, post-degree program. Students take 6 credit hours on educational psychology, which includes a focus on how to modify the curriculum and other measures for a diverse range of learners. The Roeher Institute (2003d) reported that "the challenge is to safeguard this course work because it gets put in and taken out of the teacher-

preparation program; there is pressure for future teachers to learn the [regular] curriculum instead of perceived ‘add-ons’ like educational psychology” (p. 2). The province also offers a post-Bachelor of Education Special Education Certificate, which focuses mainly on adaptations. However, neither teachers nor teaching assistants are required to acquire this certificate if they intend to work with students with disabilities (The Roeher Institute, 2003d).

Ontario’s Provincial Auditor found that “efforts to ensure that all teachers had [a strong foundation in special education service delivery] were not sufficient” (Office of the Auditor General of Ontario, 2001, p. 141), although a number of significant reforms were underway. The lack of relevant knowledge may be exacerbated by the high rate of teacher turnover in the current and next few years, resulting in “fewer experienced teachers… available to meet students’ needs and to act as mentors to the many new teachers entering the system” (p. 141). This was reported as a problem in BC as well (Roeher Institute, 2003d). The Ontario auditor reported, “The amount and nature of practical classroom experience that Ontario teachers are required to have prior to graduation” (p.142) is less than in other jurisdictions, and that Ontario places less focus than other jurisdictions on issues of disability, which tends to be slight in those jurisdictions as well.

In response to findings that teachers want more post-degree information on issues of disability, Nova Scotia’s review committee (2001) recommended that improved professional development be provided through the Department of Education. Increased funding would strengthen the department’s delivery capacity and such funding would ideally be an integrated component of special education policy implementation.

A recurring theme in the Nova Scotia report (2001) is the general lack of teacher knowledge about the specifics of disability and disability-related needs. Issues of professional development and pre-service training, especially for teachers, are cited throughout the document. Also at issue is the knowledge of paraprofessionals such as teacher assistants, “unqualified” resource teachers

and the “fragmenting (of) resource positions to ‘top off’ teacher assignment schedules, especially at senior high schools” (p. 43).

# VII. Future Directions

## A. Key Challenges to be Addressed

The review of the research, then, found that it is difficult to move inclusive education forward in the special education policy and program framework which continues to prevail in Canada. There is a tension between efforts to achieve excellence and equity in education, a tension that some researchers believe can be reconciled. While the vision of inclusion is held out in most jurisdictions, there is wide variation in the interpretation and application of provincial policies by local school boards and schools. As a result, actual implementation is inconsistent from place to place, between Catholic, public and private systems, between French and English systems and even between schools within the same system and community. Considerable time, energy and resources are expended in assessing and labelling students as having *bona fide* disabilities that meet funding criteria. While individualized education plans are often developed, the process is time consuming; teachers tend to lack the required expertise; and there is no guarantee that the plans will accurately reflect student needs let alone drive instructional practices and evaluations of student progress and teacher performance. Parents tend to have marginal involvement in the formal educational process, although they usually possess a wealth of insight and information on the specifics of their children's needs and strengths. Parents may not know about appeals processes and can face various disincentives to using those processes. Additional funding tends to be highly restrictive and difficult to secure, involving major time and effort by educators, parents and others. The disability-specific supports and other measures needed to further the education of learners with disabilities are often inadequate, uncoordinated and difficult to secure and may come on stream too late in the school year to foster the learning and broader participation of students with disabilities.

There is confusion and uncertainty about whether the classroom teacher or the teacher/educational assistant has prime responsibility for educating

students with disabilities; roles for effective collaboration need to be clarified. Teachers tend to have only minimal exposure to issues of disability in pre-service training and limited opportunities and incentives to develop their knowledge and skills in this area through ongoing professional development.

These factors together create considerable challenges for teachers who may be philosophically supportive of moving an inclusion agenda forward but who often feel hampered and ill prepared to do so effectively.

### B. A Framework of Shared Expectations: Key Stakeholders and Measures Needed

Arguably, greater focus needs to be placed on supporting regular teachers so they can succeed in their efforts to bring quality education to all learners (see Tobin Associates, 2004: 57-58). The discussion in this section is drawn from *Supporting Teachers: A Foundation for Advancing Inclusive Education* (Crawford & Porter, 2004). To further an agenda of inclusion and quality in education, key stakeholders need to support teachers in a variety of ways. Key stakeholders are:

- Provincial/territorial governments
- Ministries of Education
- Parents
- Parent associations and advocacy groups
- University teacher education programs
- Supportive professionals
- School districts
- Schools and principals
- Teacher associations

Supportive measures needed by classroom educators can be grouped according to the following themes:

- Vision and expectations
- Legislation, policy and guidelines
- Resource allocation and use
- Leadership
- Advocacy
- Public awareness and discourse

- Partnership and collaboration
- Professional development, ongoing learning and certification
- Linking policy to practice based on a sound knowledge base
- Sharing of knowledge, information and best practices with a focus on classroom instruction and support

Supportive measures that would ideally be in place for teachers are as follows:

*Governments*. In order to support teachers, provincial and territorial governments need to develop a legislative framework for education, with a coherent focus on the inclusion of all learners in regular schools and classrooms. Adequate funding needs to be allocated to make inclusion successful for teachers, students and parents. Governments also need to show leadership by establishing and modelling interdepartmental cooperation (e.g., between education, health and social services) in fostering full inclusion and educational excellence for all learners.

*Ministries of education.* In support of teachers, ministries of education could establish funding approaches that have focused, dedicated revenue streams for inclusion but without requiring categorical approaches that involve labelling and stigmatizing students while burdening classroom teachers with extra administration.

Ministries should ensure the provision of in-service and professional development, and encourage and recognize teachers' efforts for undertaking professional development. Ministries of education can require teacher candidates to develop basic skills for dealing with diversity in the classroom in order to be certified. Ministries can clearly articulate the broad directions and standards for professional training. Standards can in turn inform the efforts of teacher training institutions including universities.

Curriculum development should place some focus on diversity and inclusion and facilitate the learning of positive messages about people of diverse abilities, family backgrounds and cultures. Learning resources should be accessible and support the place in society of people with disabilities and others from diverse backgrounds and cultures. Ministries should develop clear, well-

communicated policy statements that establish inclusion as the practice norm, should disseminate practical guidelines for implementation and make available best practice documents and e-resources.

*Parents*. Parents can support classroom teachers by engaging in constructive partnerships with them. This involves establishing high but realistic expectations about the learning and development of their children, helping teachers better understand the particular needs and strengths of their children, reinforcing the teachers' efforts in their homes, and facilitating complementary activities for their children's development in the community. Parents can share information and knowledge about instructional strategies and other supportive measures that have worked well with their children and with teachers.

*Parent associations and advocacy groups*. Like individual parents, parent associations and advocacy groups can support classroom teachers by engaging in constructive partnerships. This can involve holding high but realistic expectations for the learning and development of all students. These associations can collaborate with teachers' organizations to jointly sponsor, lead and provide instruction in in-service development for teachers and school administrators. Parent and advocacy organizations can extend formal recognition for exemplary practice and can draw attention to it through newsletters, symposia and conferences. They can help develop positive public focus and attention to issues of inclusion through their dealings with the media and political leaders. They can facilitate knowledge networking and best practice initiatives, and can engage in policy development, curriculum development and advocacy.

*University-based teacher education programs*. University-based teacher education programs can develop curricula that prepare teacher candidates for diversity and inclusion in regular classrooms. They can insist that all teacher candidates meet basic competency standards on inclusive practices in order to graduate. They can provide ongoing professional development (e.g., in-service; e-learning) for teachers and leadership training on inclusion for district and school administrators so these professionals can extend their competencies gained in pre-service training.

Universities should also conduct research on inclusive school and classroom practices; advocate for evidence-based practice; and establish incentives for new researchers to place a focus on issues of inclusion in education. Ideally, university programs would be facilitating critical discourse and engaging in partnerships with ministries of education, teacher associations, parent and professional groups and other universities. Universities have a key role to play in diffusing knowledge about current research on inclusive education by translating the research and other knowledge into readily accessible language and formats for practical use in schools and classrooms.

*Other professionals*. Other professionals such as social workers, psychologists, speech and language specialists, public health nurses and personal support workers also have a role to play in supporting teachers. They can collaborate with teachers, administrators and others who are involved in the lives of young people who may be facing complex challenges. They can utilize their knowledge to help address teachers' challenges in the classroom. They can develop new strategies to facilitate inclusion and focus on reducing use of segregated practices.

*School districts*. School districts should provide leadership and policy support, articulating clear standards and expectations for administrators and teachers. They also need to communicate a commitment to support teachers in efforts to bring quality education to all learners. In their efforts to support teachers, school districts can provide professional development on best practices and link policy to practice through evaluations of school, administrator and teacher performance. They should provide adequate resources and support to schools and advocate with ministries of education to ensure that the funding and other necessary measures are in place. District-level human resource considerations should make provision for teachers to have adequate instructional planning time so teachers can gear their instructional strategies to the strengths and interests of all learners.

*The school-based team*. At the school level, the principal and other school-based team members should establish a positive, supportive and

welcoming climate for all students. They should welcome and engage in effective partnerships with parents. School leaders should encourage, support and reward teachers' professional development efforts and cultivate the model of teacher as 'lifelong learner.' Leaders should establish mutual support among teachers by creating a climate and work routines that favour teamwork and collaboration. They should ensure effective use of resources; focus the attention of teachers on effective instructional strategies; and ensure that classrooms are effectively organized for quality instruction. For their part, educational assistants/ teacher assistants and classroom teachers should find ways of collaborating so that the regular teachers have prime responsibility for educating all students but with the additional insight and expertise that EA's/TA's often bring to the table.

*Teachers' associations*. Teachers' associations should develop policies that encourage and support effective practices for inclusion. They can sponsor and provide training and, like ministries of education, universities and family/advocacy organizations, they can disseminate knowledge and information; broker knowledge networks; and foster effective practice initiatives. They can establish and maintain partnerships with parents, ministries of education, other professional groups and universities. They can reinforce the model of teacher as 'lifelong learner' and can advocate for professional development, good instructional materials and other supports for teachers. Teachers' associations can engage in positive public relations on issues of inclusion and can complement the work of family and advocacy organizations to attract public focus and attention to inclusion through the media and in transactions with political leaders.

*Concerted efforts by all stakeholders*. If key stakeholders were to engage in the efforts outlined in this section of the paper, regular classroom teachers would find themselves much better prepared and supported to bring quality education to all learners in inclusive settings.

### C. Towards a Common Policy Approach: Building on Established Objectives, Values and Principles

Considerable work has been done to forge consensus at various federal/provincial/territorial (FPT) tables across governments on key social policy issues. A policy framework for inclusive education based on shared pan-Canadian goals could build on the objectives, values and principles embedded in FPT agreements.

Such agreements include the following:

- Ministerial Council on Social Policy Reform and Renewal, *Report to Premiers* (1996);
- *In Unison: A Canadian Approach to Disability Issues* (FPT Ministers Responsible for Social Services, 1998);
- *Social Union Framework Agreement* (First Ministers, 1999);
- *First Ministers' Communiqué on Health* (First Ministers, 2000b);
- *First Ministers' Accord on Health Care Renewal* (First Ministers, 2003a);
- *First Ministers' Communiqué on Early Childhood Development* (First Ministers, 2000a);
- *First Ministers' Multilateral Framework on Early Learning and Child Care* (First Ministers, 2003b);
- *Multilateral Framework for Labour Market Agreements for Persons with Disabilities* (FPT Ministers Responsible for Social Services, 2003);
- Canada and various provincial and territorial governments' *Labour Market Development Agreements* (various dates); and
- The "Opportunities Fund for Persons with Disabilities" (Canada, 2005).

## Shared Objectives and Values

Some recurring priority themes are evident in present multilateral agreements. Nuanced to address issues of inclusive education the include the following objectives and values:

***Shared objectives***

- Foster the full and active participation of all children and youth with disabilities in regular schools and educational programs, and in society more generally.
- Support and protect children and youth with disabilities most in need.
- Ensure healthy, safe and nurturing environments for children and families.

***Shared values***

- All children can learn.
- The best situation for children to develop their potential is with their age peers, with the instructional and other needed supports in regular education schools and classrooms.
- All children are entitled to equality, fairness, human rights and dignity.
- Families and society at large have shared responsibilities for public education programs.
- There must be mutual recognition and support for the exercise of the distinct roles and responsibilities of governments, teachers, administrators, families, children/youth with disabilities, communities, voluntary organizations, business, labour and Aboriginal peoples.
- Educational programs should focus on fostering the optimal development of the skills and capabilities of all children and youth, including those with disabilities.

## Service Principles

Key service principles recur in current arrangements. Nuanced to focus on the inclusive education of children and youth with disabilities, such principles include:

***Accessibility***

- Access to reasonably comparable, regular education services throughout Canada, irrespective of disability status.
- Access across Canada to the disability-specific personal supports (e.g., educational aides, assistive devices, accessible learning environments) needed for student inclusion and success in regulars school and classrooms.

***Affordability***

- Access to affordable educational and related supportive services based on need, not ability to pay.

***Flexibility and responsiveness***

- Flexibility and responsiveness of educational services and disability-specific supports in relation to the changing circumstances of children/youth with disabilities.

***Parental control and choice***

- In identifying the educational and support preferences and needs of their children with disabilities.

***Efficiency and transparency of eligibility determination***

- Transparency of eligibility criteria and service commitments.
- Not having to repeat personal histories or undergo the same tests or assessments for disability-specific needs that are constant (e.g., repeated confirmation of a lifelong mobility impairment, intellectual disability, learning disability, vision or hearing impairment, etc.).

***Quality***

- High quality, effective, safe and person-centred educational and supportive services.

***Ensuring the exercise of mobility rights***

- By means of program features across jurisdictions that do not require residency requirements for access to inclusive public education or related supportive services; and
- By means of removal of features of education and supportive programs that impede mobility where these are in effect.

***Cultural and gender sensitivity***

- Through program measures available in both official languages where significant demand warrants.
- By effective measures to address the needs of Aboriginal Canadians.
- Through measures that are sensitive to differential impacts of policy and programs across gender lines.
- Through measures that are sensitive to issues and values stemming from ethno-racial diversity.

***Appeals and dispute resolution***

- Efficient process that does not involve major cost to parents in the event that parents feel their children have been unfairly treated or denied the educational or supportive services that they require.

**Administrative Principles**

Administrative principles that appear in present agreements, or that figure in proposals that have been advanced to improve access to disability supports, include the following:

***Collaboration***

- Between governments and other key stakeholders in inclusive education in establishing, maintaining and interpreting pan-Canadian objectives, principles and standards.

***Coordination and harmonization***

- Between educational and other ministries and programs that are needed to further the inclusive education of children and youth with disabilities (e.g., authorities and programs responsible for assessment, audiology, behavioural support, speech therapy, attendant and similar services);

- To ensure reasonably equal access to reasonably similar levels of educational and supportive services across and within jurisdictions (e.g., from province to province; from community to community).

***Flexibility***

- For provinces and local authorities to determine priorities and the suitable policy and program mix in their respective jurisdictions, within the context of pan-Canadian objectives, values and principles.

***Sustainability and affordability***

- Of the education system for present and future generations.

***Stable funding***

- That is incremental, predictable and sustained over the long-term.

***Partnerships***

- Between governments, among government ministries and between government ministries, parents, and other stakeholders.

***Accountability***

- Through public reporting by governments in view of commonly accepted indicators of program effectiveness.

***Knowledge generation and information sharing***

- On good practices, to improve the overall effectiveness and efficiency of the pan-Canadian system.

***Citizen participation and input***

- In designing inclusive programs and in reviewing outcomes.

## D. Research Directions

A network of university-based and other researchers[7] has been meeting to assess research needs in the area of inclusive education. They share the opinion that a clearer picture needs to be developed of the order and magnitude of challenges in policy making in inclusive education, and the impacts of policy on educational outcomes. Documentation is needed on the impact of good policy when actually carried into practice and research products are needed that can be used to educate stakeholders in various jurisdictions.

Specific research considerations are as follows:

### *Legislation and Policy*

- Pan-Canadian research is needed on legislation and policy on inclusive education, special education and education more generally. There has been little in the way of comprehensive Canadian research that touches on inclusion since the work of William Smith in the 1990s.

- *Ongoing* research and analysis of legislation and policy is needed. The methodology should allow for a fluid, easy-to-update policy scan.

- Dimensions of *effective* government (and school district) policies concerning inclusion need to be better understood. Indicators of good policy need to be developed and could be presented as guidelines for school boards.

[7] These are Dr. Vianne Timmons, University of Prince Edward Island; Dr. Judy Lupart, University of Calgary and University of Alberta; Dr. Robert Doré, University of Quebec at Montreal; Dr. David Philpott, Memorial University; Dr. Zana Lutfiyya, University of Manitoba; Dr. Anne Jordan, University of Toronto; Dr. Nancy Hutchinson, Queen's University; Dr. Gordon Porter, Pres Q'Isle University; Dr. Roger Slee, McGill University; and Cameron Crawford, The Roeher Institute.

- Research is needed on policies that have impacted *adversely* on inclusion (even where such policy may be ostensibly supportive of inclusion) and on how/why policy has had adverse effects.

- Policy processes have been well documented in the sociological literature, but not much has been done on the policy-making processes in inclusive education. For example, who makes policy? Who does and doesn't get to speak? Who claims authority? What is the expertise that is informing the process? This kind of study would be useful. The horizontal and vertical dimensions of the policy process should be taken into consideration.

***Linking Policy to Practice***

- Policies state intentions or aspirations but there continues to be a 'disconnect' between policy on inclusive education and actual practice. What accounts for the tension / disconnect between stated policy and actual practice?

***Accountability Regimes***

- The policy-practice disconnect raises the issues of accountability. However, accountability regimes and measures to ensure compliance can be negative forces. How do these work? What's the price of surveillance and of sanctions?

***Trend Analysis***

- Some analysis of trends would be useful. For example, is there a current backlash against inclusive practice? If so, what are the causes? Where do we stand on the extent to which young people with disabilities are in effective, inclusive educational arrangements?

### *Cooperative Education*

- It would be helpful to conduct research on inclusive cooperative education initiatives. The research would need to look at school board and school-level documentation and would should provide examples of, and account for, policy drift.

### *Teacher Preparation and In-service*

- Research is needed on what teachers know about disability and about the diverse learning needs and learning styles of students with disabilities.

- Research is also needed on policy commitments and teacher preparation/in-service practices that ensure a focus is placed on addressing the learning needs of all children. Teachers receive general background on addressing diversity, but there tends to be little focus on children with disabilities.

### *School and Classroom Practices*

- Research is needed on how and why good inclusive practice is a strong predictor of good outcomes for all students.

- A better understanding is needed of the relationship between student achievement and: a) overall class size; b) the number of children with disabilities (including students receiving accommodations) in the regular classroom; c) student socio-economic status; and d) other explanatory factors (e.g., instructional and school-wide practices).

- Research is needed on how the division of discourses in special education along parent organization and political lines has diverted attention away from classroom practice.

- Research is also needed on some of the key provincial/territorial similarities and differences in school and classroom practices on inclusion.

- An update of Dr. Vianne Timmons' scan of cross-Canada practices would likely be of interest to a journal. It would take a year to develop and would require research assistance in several provinces.

***Assessment and Placement***

- There is a tension between needs identification and placement decisions. What is the nature of the tension and how does it impact on inclusive practice? Governments tend to ignore this area.

***Values and Attitudes***

- What are teachers' current attitudes concerning disability and students with disabilities? We presently lack *pan-Canadian* research on attitudes towards inclusion, diversity, etc.

- Examples and dimensions of school norms that foster an ethos of inclusion need to be better understood.

***Aboriginal Issues***

- There is a need for good research on how Aboriginal communities are working with students with disabilities.

### *General*

- While Canadians aren't out front doing the international comparative work on inclusive education, there is a need for such work. Colleagues in the UK tend to be doing most of this kind of research.

### *Funding Issues*

- Federal funding is needed for research on inclusion. Funding is also needed at the provincial/territorial level. Research on Foetal Alcohol Syndrome/Effects (FAS/FAE) and autism is well supported at the provincial/territorial level. However, there is little provincial or territorial funding for research on inclusion.

### *Communication*

- Research and information has to be designed and deployed so it reaches teachers and shapes teachers' attitudes and practices.

## VIII. Conclusion

Education matters to the general health, well-being, income security and citizenship of Canadians. If properly implemented, education programs that include students with disabilities in regular classrooms and schools can more effectively deliver positive social and economic outcomes than arrangements that label, segregate and stigmatize students.

While Canadians face many challenges to gaining information and knowledge about how students with disabilities are faring in primary and secondary education arrangements, there is an increasing shift to regular classroom placements for students with disabilities, although a small yet fairly consistent proportion of students with disabilities are mainly in special program placements. As well, the proportion of young adults who have undergone a robust model of inclusive education has been increasing.

Despite progress in moving towards more inclusive education arrangements, it is difficult to move that agenda forward in the special education policy and program framework that continues to prevail widely in Canada.

Many considerations and efforts are required to support teachers so they can advance inclusive, quality education for all learners. A pan-Canadian policy framework consistent with the objectives, values and principles outlined in this paper, backed up by investments, and other measures to bring about outcomes outlined in the Framework of Shared Expectations, would make a significant positive difference in closing gaps, addressing inconsistencies and easing tensions in the present system. A robust research agenda would enable the tracking of progress and drift and would help yield a better-informed system.

Such an approach would go a considerable distance to ensuring that teachers have the supports they need to bring quality education to *all* learners in regular schools and classrooms, and that children and youth facing various challenges – including intellectual and other disabilities – would receive the

educational and other supportive services they need to thrive as valued learners with their age peers in inclusive arrangements.

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