



Department of Education

**Resource and Training Programme for
Educator Development:
Building an Inclusive Education and
Training System**

**End-Term
National Quality Evaluation**

**FINAL REPORT
November 2002**

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CHAPTER ONE INTRODUCTION

1. INTRODUCTION

The Department of Education/Danida Project entitled: Resource and Training Programme for Educator Development: Building an Inclusive Education and Training System, made provision for a national quality evaluation of the project. This provides a means of verifying the effectiveness of implementation as well as the nature and quality of the outcomes that have been reached. While the national quality evaluation involves an external assessment, the entire project has been designed to ensure ongoing internal monitoring and evaluation through various mechanisms, the most important of which is the action research components of the pilot projects in the Eastern Cape, KwaZulu-Natal, and North West provinces.

A research team co-ordinated by the Education Policy Unit (EPU) at the University of the Western Cape (UWC), and led by Sandy Lazarus and Colleen Howell, was commissioned by the Project Steering Committee to conduct the national quality evaluation. This evaluation comprised two phases. Phase One consisted of a mid-term evaluation (refer Mid-Term Evaluation Final Report, Department of Education, 2001). This phase was primarily formative in nature. It aimed at capturing the process of project development as well as strengthening the capacity of the different project role players to reflect critically on their activities so that they could identify improvements and actions to be pursued in the second phase. Phase Two (this evaluation) comprises the final evaluation of the two-year project and includes both summative and formative aspects, as outlined below.

2. AIMS OF THE NATIONAL QUALITY EVALUATION: PHASE TWO

The overall aim of this study was to conduct a national quality evaluation of the key components of the project. This evaluation was of a formative and summative nature, recognising that the process of the project's implementation and the quality of the delivered outputs are important in learning about and drawing from the pilot projects.

With this broad aim in mind, the following objectives were identified for the second phase:

- drawing out the strengths and weaknesses of the pilot projects, with a view towards informing the ongoing implementation of White Paper 6 in the three pilot districts and in other provinces
- in particular, drawing out 'best practices' from the pilot projects that can be used to guide the ongoing implementation of White Paper 6 in the three pilot districts and in other provinces
- using the insights gained through the pilot projects to provide indicators for inclusive education which could act as benchmarks for ongoing policy and practice development in the country

- supporting and informing the action research process in the pilot projects to support ongoing monitoring and internal evaluation of each of the project components
- providing insight into and critically analysing specific strategies used and developed during the project, particularly with regard to capacity building of specific target groups, and mechanisms towards sustainability of inclusive education in the pilot districts
- informing the National Department of Education of the appropriateness of the training programmes and materials developed through the project for ongoing use in the training of teachers towards the implementation of White Paper 6 and the ongoing development of an inclusive education and training system
- sharing with Southern African Development Community (SADC) countries the lessons learnt from the project with a view to contributing to the development of inclusive education and training systems in their own countries
- providing Danida, the Department of Education, the Project Steering Committee and the National Stakeholders Forum with a final report on the national qualitative evaluation of the project.

3. OVERVIEW OF RESEARCH METHODOLOGY

3.1 Research Approach

As outlined in the previous report (Mid-Term Evaluation Final Report, Department of Education, 2001), while the researchers have attempted to draw on a range of approaches to this evaluation, a central concern has been to create a research design that allows for both formative and summative evaluation to take place. The formative aspect is considered to be particularly important as the focus in the project is primarily on ongoing development, in particular, in relation to the implementation of inclusive education in South Africa. The approach adopted in this evaluation relates directly to the project's overall commitment to an action research approach, which includes an overt commitment to capacity building through the research process. However, there is also a need to look at more 'measurable' outputs (the summative aspect) that were planned for, both in the Project Document¹ and by the individual consortia and Project Management Teams (PMTs) in each of the three provinces.

This national quality evaluation, therefore, constitutes a systematic evaluation located within an action/participatory approach to research. The first defining factor (systematic evaluation) refers to the overall research methodology employed, while the latter (action/participatory research) refers to the manner or way in which the research has been conducted – within a capacity-building, reflective practice framework that aims to contribute to development.

Finally, it should be noted that, within the context of a commitment to development and capacity building, the national quality evaluators were committed to engaging 'critically' with the data emerging from the research. This 'critical' stance includes trying to reflect on what people are saying within the context of the challenges posed by the values and principles of White Paper 6. Attempts are made in this report to

¹ Project Document of the Resource and Training Programme for Educator Development: Building an Inclusive Education and Training System, Danida, 1999

highlight contradictions where appropriate; to grapple with tensions relating to the challenge of implementing inclusive education, and, more broadly, to indicate key challenges that seem to be arising from this initial implementation of policy. The key purpose of this critical engagement is to assist in taking the process further, for the provinces, and for the country and region as a whole.

3.2 Research Design

Below is a 'birds-eye-view' of the national quality evaluation-related activities for 2002. Some specific comments on each of the main activities are provided below this table.

Table 1.1

Activity	Details of Activity	Responsibility	Timeframe
1. <i>Proposal for Activities</i>	1.1 Development of proposal	1.1 Evaluation researchers	February
	1.2 Negotiation of proposal	1.2 Project manager and prov co-ordinators	March
2. <i>Planning workshop</i>	2.1 Preparation for workshop	2.1 Project manager and prov co-ordinators	March
	2.2 Collective planning of evaluation process, including identification of goals and outcomes for the second phase evaluation	2.2 Evaluation researchers, Project manager, prov. co-ordinators & action researchers	April
	2.3 Finalisation of terms of reference for 2 nd phase	2.3 Evaluation researchers	End April
3. <i>Provincial monitoring and evaluation</i>	3.1 As per negotiated agreement, provincial action researchers pursue ongoing monitoring of their projects	3.1 Provincial researchers	April-August
4. <i>Development of evaluation questionnaire(s)</i>	4.1 Developing evaluation questionnaire based on provincial input	4.1 Evaluation researchers	May-June
	4.2 Each province developing a programme of action for completion of questionnaire	4.2 Provincial researchers	June-August
5. <i>Development of indicators for inclusive education</i>	5.1 Developing inclusive education indicators based on provincial input and literature review (2001)	5.1 Evaluation researchers	May-June
	5.2 Provincial and national consultation on indicators – through questionnaires and interviews	5.2 Evaluation researchers with pilot provinces and Department of Education	July - August

6. <i>Materials assessment</i>	6.1 Identification of process and outcomes for materials assessment	6.1 Evaluation researchers, programme manager, accreditation task team and prov. co-ordinators	March-April
	6.2 Assessment of materials based on negotiated criteria and process	6.2 Assessors pursue assessment process	March-August
7. <i>Completion of questionnaire(s) in provinces</i>	7.1 All key role players in the pilot programmes complete questionnaire	7.1 Provincial action researchers	July/August
8. <i>Analysis of questionnaire(s)</i>	8.1 Quantitative and qualitative analysis of questionnaire data	8.1 Evaluation researchers and research assistant	August
9. <i>'External' quality evaluation in provinces</i>	9.1 Areas of focus for specific provincial and national interviews identified	9.1 Evaluation researchers	July
	9.2 Conducting of interviews in three provinces and nationally	9.2 Evaluation researchers	August
	9.3 Analysis of interviews	9.3 Evaluation researchers	August
10. <i>Compilation of Final Evaluation Report and 'Learning from Practice' Booklet</i>	10.1 Pulling together all research data and findings	10.1 Evaluation researchers	September
	10.2 Writing first draft	10.2 Evaluation researchers	September
	10.3 National and provincial consultation around first draft	10.3 National and provincial stakeholders	October/November
	10.4 Finalisation of Final Report	10.4 Evaluation researchers	End-November
	10.5 Preparation of 'booket' on 'Learning from Practice'	10.5 Evaluation researchers and language accessibility editor, in consultation with provincial co-ordinators	End-November

Notes:

(1) Research team:

The composition of the national quality evaluation research team is outlined in Appendix A to this report.

(2) Planning workshop:

A planning workshop, including one of the evaluation researchers, the national project manager, provincial co-ordinators and action research team leaders, was held in Johannesburg in April 2002. The core purpose of this workshop was to:

- clarify the link between the national evaluation and the provincial action research processes
- develop a clear plan of action for ongoing monitoring and evaluation through the provincial action research processes – linked directly to the national quality evaluation plan

- identify clear evaluation goals and expected outcomes (that comprised the key criteria for the national evaluation)
- identify a plan for developing national indicators for inclusive practices
- negotiate a final research plan for the second phase of the evaluation.

(3) Provincial monitoring and evaluation:

During the period April – August, the action researchers pursued their own ongoing monitoring and evaluation processes in their provinces. This included the development and completion of the evaluation questionnaire by teachers and principals in the pilot schools, as well as the Project Management Teams (PMTs) and Project Support Teams (PSTs) in the districts concerned.

During the planning workshop referred to above, it was decided that each province would pursue the completion of questionnaires in a way suitable to their particular contexts. Therefore, slightly different strategies were adopted in the three provinces. In the Eastern Cape, the action researcher assisted by the project co-ordinator contacted all the schools concerned to request their assistance in the process of questionnaire completion. Thereafter, he trained seven College of Education lecturers who then administered the questionnaires directly with the teachers and principals in the schools, assisting them where necessary. The action researcher followed up on the questionnaires with the PMT and PST himself. These completed questionnaires were handed to the evaluation researchers when they visited the province for the focus group interviews.

In the KwaZulu-Natal project, the consortium leader, with the assistance of the provincial project co-ordinator and others in her team, took responsibility for ensuring that teachers and principals at schools completed the questionnaire. The PMT and PST questionnaires were handed to members of these teams by the project co-ordinator, and collected by the evaluation researchers directly after the focus group interviews held in August.

In the North West project, the action research team leader and provincial project co-ordinator took the questionnaires to the schools where they explained to principals what was required, and went through the questionnaires to clarify where necessary. The principals then organised for the teachers to complete their questionnaires, which were collected from them by the provincial project co-ordinator two weeks later. The project co-ordinator also ensured that questionnaires completed by the PMT and PST in this province were sent to the evaluation researchers.

(4) Evaluation questionnaires and interviews:

Quantitative and qualitative data, based on agreed-upon criteria arising out of the above mentioned processes, was collected through questionnaires completed by all relevant role players (Appendix B). This included teachers and principals in the pilot schools, as well as members of the PMTs and PSTs at district level. Questions asked covered the full range of concerns relating to the aims of this national quality evaluation. The headings and subheadings framing the findings in Chapters Two, Three, Four and Five in this report provide an overview of these aims. The questionnaires included both open-ended and closed questions.

In addition to the data collected through the above mentioned questionnaires, the national evaluators conducted focus group discussions with (a) the three district PMTs and PSTs, and (b) the National Department of Education: Directorate for Inclusive Education. Postal questionnaires were also sent to the National Stakeholder Forum and to the provincial Consortium leaders. Some of the members of these forums were also involved in the focus group interviews in the provinces as members of the PMT and/or PST. All these instruments (refer Appendix C) focused on obtaining qualitative depth into the key questions guiding this national evaluation. The key questions asked were: what the key difficulties have been in trying to implement inclusive education; 'what works', from the experiences of those involved in the pilot projects; identifying key indicators for inclusive education; and identifying what has been and what needs to be in place to manage and sustain the further implementation of inclusive education in the districts, and in the country as a whole.

The questionnaires and interviews were analysed by the national quality evaluators and an additional research assistant. The frequency of responses to the closed questions in the questionnaire were analysed and are presented in the form of tables throughout the report. A content analysis of the qualitative data from both the questionnaire and interview responses was undertaken. Key themes prescribed by the questions posed and then around key emerging themes arising out of the responses themselves were used to analyse this data. The trends and patterns outlined in this report emerge directly from a summary of this analysis.

(5) Indicators for inclusive education:

The process of developing national indicators for inclusive education commenced in the first phase of this project through a brief literature review by the national quality evaluators (presented in a discussion document in 2001), and through the action research processes in the three provinces (although this 'organic' data has not yet been collated in the form of indicators for inclusive education). It was proposed that, building on what was commenced in 2001, this second phase should focus on compiling a first draft of indicators for inclusive education that could be used to guide all provinces in the next few years. At the planning workshop referred to above, the following categories for the inclusive education indicators were agreed upon: (a) contextual factors, (b) respect for diversity, (c) institutional environment, (d) support provision, (e) curriculum challenges, and (e) management and sustainability challenges. All role players were asked to give their input, through the questionnaires and interviews, on what they considered to be key indicators for inclusive education in the South African context.

(6) Materials assessment:

During 2002, three materials assessors (one from a university context, one from a 'community' context, and one with language accessibility expertise (refer Appendix A) were asked to assess all relevant materials from the three pilot provinces. In addition to these three members of the research team, a member of the National Department of Education's 'Educator Development' directorate was asked to participate where possible in the process to assist in assessing the relevance of the programmes and materials for broader educator development in the country.

The programme outlines and materials from each of the three provinces were submitted to the evaluation researchers at the end of June 2002. This included:

- teacher training programmes and materials for the formal training of teachers at levels 5 or 6 (NPDE, ACE, or PGCE levels)². Materials were made up of one module of 3 x 10hr units.
- Training materials and programmes used by the provinces in training and capacity building activities with school management, governance structures, the District Support Teams (DSTs), members of the community and any other identified role players.

The assessors assessed these materials on the basis of agreed upon criteria for assessment (refer Appendix D). While these criteria provided the framework for their evaluation of the materials, each assessor also looked at the materials from a particular perspective (that is, community perspective, university perspective and accessibility perspective). The key findings from the reports submitted by the assessors have been integrated into Chapters Two, Three and Four of this report. The full reports have been sent to the provincial consortia for their consideration.

(7) Final evaluation report:

As can be seen from Table 1.1, it is envisaged that the process of completing the final report on the national quality evaluation will follow the same procedure as in 2001. This includes (a) the development of a first draft of the report (deadline for completion being September), (b) an opportunity for provinces to examine and comment on the report (during October/November), and then (c) completion of the report by the end of November 2002.

(8) Learning from practice booklet:

In addition to the final report, a booklet on 'Learning from Practice' has been commissioned by the Department of Education. The purpose of this booklet is to share the key findings from the pilot projects with the country and SADC countries. It is proposed that this product focus on drawing out the learnings from 'good practices' of inclusive education at the different levels of the system (classroom, school, school-community, district and other levels of support and management). This will include identifying difficulties that were experienced, how these difficulties were or could be addressed, as well as key principles or challenges that this poses for the further implementation of inclusive education. This booklet is intended to provide all role players with an accessible resource for informing the ongoing implementation of White Paper 6.

4. LIMITATIONS OF RESEARCH PROCESS

At provincial level, all teachers and principals in the pilot schools were asked to complete questionnaires. In addition, some members of the PMTs and PSTs also completed questionnaires. Thereafter, some members of the PMTs and PSTs were interviewed through a focus group process in order to pursue some of the key issues in more depth. The views of some members of the Consortia were also obtained, either through their participation in the PMT/PST focus group interviews or through the postal questionnaire.

² National Professional Diploma in Education (NPDE), Advanced Certificate in Education (ACE), Post Graduate Certificate in Education (PGCE)

At national level, the Department of Education: Directorate on Inclusive Education were also interviewed for their views on their role in supporting the implementation of inclusive education in the country. An attempt was made to interview the National Stakeholders Forum constituted around this project, but this was not successful. As a result, a brief questionnaire was sent to them. Unfortunately, at the time of finalising this report none of the members of the Forum had managed to complete their questionnaires and return them to the national quality evaluators.

A central limitation to this research process has been the omission of data (direct responses) from members of the School Governing Bodies (SGBs), parents, and the local communities who were involved in the pilot projects in the provinces. It was impossible, in the context of time and financial resources provided for this evaluation, to include the above mentioned role players in the research. However, it is hoped that this will be done in the future. As these stakeholders are key potential beneficiaries and participants in the implementation of inclusive education, they do, at some point in time, need to be involved in assessing the effectiveness of this implementation, and in suggesting ways forward that will meet their needs more adequately.

In analysing the responses from teachers to the questionnaires, it is also recognised that despite real attempts to make them as accessible as possible, there may have been some questions that were not clearly understood by all teachers. Where the data appears to indicate some possible misunderstandings, these are explained in the provincial chapters.

It should be noted that, as mentioned in the report of the first phase of the evaluation (Mid-Term Evaluation Final Report, Department of Education, 2001), the objectives of this national quality evaluation should be seen as distinct from and complementary to those of the project review process. As already emphasised, the aim of the national quality evaluation was to assess the project's impact and value as a piloting initiative towards the implementation of the new policy on inclusive education in the pilot provinces. In this second phase, in particular, the evaluation has focused on the 'quality' of the project's impact in this regard. It has not focused on evaluating directly the functioning of the project structures or the extent to which specific project outcomes have been met. It is expected that the final project review process will explore these areas in more depth.

5. OUTLINE OF REPORT

In Chapters Two, Three and Four, the data gathered in the three provinces is presented according to the key themes referred to earlier in this chapter. This data brings together both quantitative and qualitative data from the teachers, principals, PMTs, PSTs, and the project consortia. The findings emerging from the responses to the questions are descriptively summarised, where after 'critical' comment from the national evaluation researchers is offered.

Chapter Five provides a national picture through a synthesis of the data gathered from all three provinces. As will be discussed in this chapter, many of the strengths and weaknesses, and lessons to be learnt, are common to all three provinces. This

chapter also includes 'critical' comment from the evaluation researchers where appropriate.

Chapters Six and Seven are attempts to capture particular aspects of the findings of the research, focusing on a consolidation of 'Learnings from Good Practice' (Chapter Six) and 'Indicators for Inclusive Education' (Chapter Seven). Both of these chapters highlight what we can learn from the positive and difficult experiences of the three provinces, and how this can help us to identify clear goals and outcomes relating to the implementation of inclusive education in the country as a whole.

Chapter Eight of the report highlights key recommendations emerging from the findings of the national quality evaluation. These recommendations are captured under key themes or areas of challenge. An attempt has been made to make these as practical as possible, for the purposes of assisting the three pilot provinces and the country as a whole in addressing the challenges that face us as we attempt to develop an inclusive education and training system over the next 20 years.

CHAPTER TWO

EASTERN CAPE PROJECT

1. INTRODUCTION

The research conducted as part of the second phase of the National Quality Evaluation in the Eastern Cape Province included the following methods of data collection:

- The development and administration of separate questionnaires to teachers in the pilot schools, the principals of pilot schools and members of the Project Management Team (PMT) and Project Support Team (PST)
- Focus group interviews by the national quality evaluators with members of the PMT and PST
- Focused assessment of the educator development and capacity building materials by three assessors.

The questionnaires and interview schedules used are attached at the end of the report as Appendix B and C respectively. The separate reports by the materials assessors for this province will be sent directly to the province for their attention.

The questionnaires were administered in this province by the action researcher, assisted by the Project Co-ordinator. He contacted all the schools concerned to request their assistance with completing the questionnaires. Thereafter, he trained seven College of Education lecturers who then administered the questionnaires directly with the teachers and principals in the schools, assisting them where necessary. Questionnaires were also given to members of the PMT and PST and then followed up by the action researcher. The completed questionnaires were handed to the national quality evaluators when they visited the district on 5 and 6 August 2002 to undertake the focus group interviews.

The findings of the research process undertaken in this province and presented in this chapter are drawn from the following sources of primary data:

- Returned questionnaires from 10 principals
- Returned questionnaires from 136 teachers
- Returned questionnaires from 3 members of the PST/PMT
- Interview notes from focus group interview with 9 members of the PST
- Interview notes from focus group interview with 10 members of the PMT¹
- 3 reports from materials assessors

As indicated in Chapter One the findings of the research are presented under headings that relate to the original aims and objectives of this final phase of the national quality evaluation.

¹ It should be noted that there is some overlap between members of the PMT and PST

2. BENEFITS OF THE PROJECT

2.1 Introduction

All stakeholders were asked to say in the questionnaires whether they felt that the project had been of benefit to the pilot schools involved. They were also asked to clarify their answer by saying what they felt the specific benefits have been. If they felt that the schools had not benefited they were also asked to explain their reasons for saying this. If the respondents said 'yes' to this question (that is, the school had benefited from the project), they were asked to clarify how much they felt the school had benefited.

2.2 Have the pilot schools benefited from their involvement in the project?

Table 2.1

Answer type	Teachers	Principals*	PMT & PST*
Yes, definitely	61 (44.9%)	6	1
Yes, but not very much	49 (36.0%)	4	1
Not sure	14 (10.3%)	0	1
No	5 (3.7%)	0	0
No answer	7 (5.1%)	0	0

* Percentages are not included due to the small number of respondents

Table 2.1 clearly indicates that all the key role players felt that the project had benefited the schools in the pilot district. These positive responses did, however, differ with regard to the degree of benefit. Approximately half of the respondents said that it had definitely been good for the schools while the other half said that it had helped, but 'not very much'.

2.3 How have the schools benefited?

The common benefits highlighted by all the role players include the following key points. The educators have benefited through the training they have received where they have learnt about inclusive education. In particular, their attitudes towards differences in the classroom, and, in particular, disability, have changed in a positive way. Also, they now understand and appreciate the barriers to learning that cause exclusion of learners, and they are more able now to address these challenges through practical problem solving.

Another specific implication of inclusive education that was highlighted through this process was the need for buildings to be accessible to all learners. The role of

parents and community people and structures in providing support to building an inclusive school was also highlighted in this project.

2.4 Why have schools not benefited?

Only the teachers responded to this question. Three main reasons were given for why they have not benefited from the project. The first one was that the basic conditions of the schools, which were poorly resourced, made it difficult for the project to work. The second reason related to anger expressed that expectations were raised but not fulfilled with regard to receiving more resources for the school. And, thirdly, teachers felt that unrealistic demands were made on their time, and that this increased their stress.

2.5 Summary and Comment

The project clearly was of benefit to the pilot schools in this project. Realistic concerns around the lack of basic material resources, and the resource of 'time' (for the teachers) were given as the primary reason why these benefits were limited.

3. WHAT WORKS?

3.1 Introduction

In the questionnaires teachers, principals and members of the PST and PMT were asked to comment on what parts of the project had worked the best. This question was also asked of the PMT and PST members in the focus group interviews. Getting people to reflect on what had worked in the project and why, was seen as a very important aspect of the evaluation process. It was hoped that through their involvement in the project role players would identify 'best practices' in implementing the inclusive education policy. Learning lessons from the project to share with the rest of the country and members of the Southern African Development Community (SADC) has been a central aim of the project.

The findings shared below are presented in a synthesised way, drawing together the main views of all role players involved in the evaluation research. A slightly more detailed presentation of some of these 'good practices' are outlined in Chapter Six in this report. It should also be noted that, shortly after finalising this report, a 'booklet' on 'Learning from Practice' will be compiled and distributed through the Department of Education to all provinces and SADC countries, thereby sharing the 'good practices' (including difficulties experienced) that have emerged during this project.

3.2 What Worked?

The following key areas were highlighted by the various role players in response to the question of what has worked well through this project towards the implementation of inclusive education:

Awareness of the Policy on Inclusive Education:

- All role players have become aware of the new policy on inclusive education, and of what 'inclusive education' means. This includes an awareness of the rights of children with disabilities to receive education.
- All role players became aware of the barriers to learning that result in exclusion of learners, and were equipped to address some of these barriers (teachers referred specifically to learning how to address problems relating to 'abuse').
- Attitudes towards 'differences' became more positive, particularly in terms of attitudes towards people with disabilities.

In the School:

- Teachers in particular learnt how to integrate the goals and strategies of inclusive education in all aspects of the curriculum – in their classroom practices. This included what to teach, how to teach, how to assess learners, how to manage the classroom – in order to include all learners.
- The action research process has been a useful strategy for helping teachers to do all of the above.
- The training provided to the teachers was considered to be very helpful, and essential to implementing inclusive education. The bursaries offered to teachers were a very positive incentive.
- Some teachers already have been trained in 'remedial education' and have been able to provide 'learning support' expertise in the schools.
- Institutional-Level Support Teams (ISTs) were developed in the pilot schools, and these support structures helped to link the school with the district support available.
- The attitudes of members of the School Governing Body (SGB) have changed through the capacity building that has occurred, and they are now developing 'inclusive' school policies, are aware that they need to make their schools more accessible, and are involved in poverty alleviation projects.
- Learners with disabilities have been included in some of the schools, particularly at the early childhood development (ECD) level.
- Through this project, schools have had access to funds to help them to make their schools more accessible.
- All the role players, including the teachers in the schools themselves, discovered the importance of 'working together' in teams, and learnt to do this better.
- The 'pilot' has had a ripple effect on the schools in the area. This has been optimized by some of the pilot schools 'mobilising' for inclusive education in the area.

At District Level:

- At district level, there were positive experiences of 'working together' to address various barriers to learning, through the PST and PMT. This was true for the Departments of Correctional Services, Health and Welfare in particular.

- The health promoting school strategy was successful in bringing the Departments of Education and Health together to address various 'health' (physical, psychological and social aspects) barriers to learning.
- The Project Co-ordinator has been a very positive force in the successful implementation of inclusive education in this district and province. Successful implementation *requires "a core group of committed people at district and provincial levels ... you need a 'critical mass' for sustainability"*.
- At provincial level, it has helped the district to have a *"strong statement from the provincial office that all new buildings or renovations to buildings must be accessible"*.
- The visit of members of the National Directorate on Inclusive Education to the provincial office *"helped a lot to get people outside of the 'special needs' area to recognize that this is an important issue for them as well, and since then there has been more commitment and involvement from other people in the department"*.

Special Schools/Resource Centres:

- The special schools/resource centres have enjoyed the training that they have received and are trying to meet the challenges of developing a new role for themselves.
- Existing human resources have been optimised through the use of the College of Education lecturers to help with the training and the action research.

Community Partnerships:

- The importance of involving parents in various ways in the life of the school was highlighted through this project. Successful projects including parents were developed. Parents have been involved in the development of vegetable gardens and in the training/capacity building programmes themselves (e.g. parents of children with disabilities have helped to raise awareness of the 'rights' of these children to quality education).
- The involvement of people with disabilities in leadership positions in the project has helped to change attitudes towards people with disabilities.
- Members of the community have been drawn in to help schools to address many 'basic' needs such as safe and secure buildings. *"Inclusive education initiatives have led to improved relationships between the pilot schools and their surrounding communities"*.

3.3 Summary and Comment

This project has experienced many success stories, at all levels of implementation. Most of the 'good practices' highlighted above relate to the development of understanding of the new policy; changing attitudes towards inclusive education and 'diversity', in particular, people with disabilities; the development of inclusive classroom practices; various aspects of school development; the development of positive school-community partnerships; and the development of collaborative support provision at the district level.

It should be noted that all of these 'good practices' included many difficulties that had to and still need to be addressed to make 'inclusive education work'. Chapter Six in this report outlines, in more detail, the key 'good practices' highlighted above, drawing out learnings that can act as guidelines for others wishing to learn from this important pilot project.

4. DIFFICULTIES AND CHALLENGES

4.1 Introduction

One of the main questions often asked by people and countries who want to know how to implement inclusive education is "what was difficult and how did you overcome those difficulties?". This section of the evaluation deliberately focuses on the difficulties that the various role players experienced when trying to implement inclusive education in this province. This information can be very useful when planning for further implementation in this district and beyond.

This information, obtained from the questionnaires and interviews, is synthesised across role players as they tended to highlight the same issues.

4.2 Key difficulties experienced through this project in the implementation of inclusive education

When responding to the questions relating to this section of the evaluation, the following key issues were highlighted:

Educator Development:

- Attendance and participation of teachers in the training workshops has sometimes been a problem.
- The teachers are struggling to cope with all the demands on their role.
- Many teachers said that they needed more practical guidance and more resource materials. They still feel unconfident.
- Many of the teachers said that the demonstration of wheelchair access was not successful and that it, in fact, resulted in a negative attitude towards people with disabilities.

School Development:

- SGBs don't understand the policy and so 'inclusion' has not been integrated into the schools' policies.
- It has not been easy to set up the ISTs. They need more training to carry out their role better.

Support Provision:

- Support needed by the schools from the district team has not always been available. And when this support is provided, it is often not followed up.
- The members of the PST and PMT are not clear about their roles in providing support, and they meet too seldom to develop their capacity to provide better support.

- Many education officials still do not see inclusive education as being their responsibility. This reflects the general lack of integration of policies and planning at district and other levels.
- Support professionals at the district level are reluctant to become involved ... they do not see the importance of their roles in providing training and supporting/visiting schools ... they are also overworked.
- Existing education posts are not being optimally used (e.g. College of Education lecturers).
- It has not always been easy to access support from the specialist support personnel (e.g. parents had difficulty obtaining access to the hospital after they had been referred there).
- Lack of proper collaboration between government departments makes it difficult to deal with some challenges (e.g. inclusion of an ex-prisoner in a school).
- The special schools/resource centres cannot cope with the challenge of teaching *and* providing support to other schools as they have too few staff, and, their own buildings and the infrastructure between schools in the district are not accessible. They do not feel equipped to play their new role.

Community Partnerships:

- It is not easy to get parents or the 'community' to be involved in the schools.
- 'The community' do not always respect the resources in their community ... they may look after the school, but not the surrounding area. Security is a key issue for many of the schools.

Socio-economic and Contextual Issues:

- The effects of poverty, as a major barrier to learning, are difficult to address.
- The 'basics' are not there in the schools! Poor physical infrastructure is particularly a problem.
- The project raised the schools' expectations that they would receive more resources, and they were angry when this expectation was not fulfilled.

Policy Implementation:

- Members of the PST and PMT are concerned about sustainability of the implementation process now that the project is drawing to a close. The loss of the Project Co-ordinator at this point in time is a key concern.
- The high staff turn-over/moving of people within the Department of Education over the last couple of years has made implementation of the policy almost impossible.
- Support from the senior management in the province is crucial for successful implementation but remains a central challenges.
- Ongoing advocacy around inclusive education needs to be maintained for the policy to be effectively implemented.

4.3 Summary and Comment

Despite the fact that the pilot schools were exposed to a great deal of training and support through this project, it is interesting to note that the teachers' difficulties relate mainly to the need for more training! This is, however, a realistic view of the length of time it takes to change one's thinking and practice. This is a factor that needs to be taken into account by the Department of Education in its ongoing strategic planning and budgeting.

The difficulties highlighted above also reveal the challenges that still need to be faced at district level. There is a need for more capacity building; clarification around roles and functions; addressing staff shortages and utilisation of existing staff; and various challenges relating to learning to 'work together' in an integrated, planned and coordinated way.

Finally, the lack of 'basics' (resources and conditions for effective functioning) in the schools and communities are a reality that needs to be concretely taken into account in the implementation of inclusive education.

5. ROLE OF PROJECT IN POLICY IMPLEMENTATION

5.1 Introduction

This section of the evaluation focused on drawing out lessons that can be learnt from this pilot project for general education policy implementation. In this project, a combination of strategies was used to implement White Paper 6 on inclusive education. This included a 'top-down' approach reflected by the introduction of new education policy, as well as a 'bottom-up' approach which focused on action research, training of teachers in the pilot schools and capacity building at the district level. The questions raised in the research were aimed at finding out what the different role players' experiences were in relation to the success of these strategies: did they actually help them to implement the policy on inclusive education?

5.2 Did this project help teachers to understand and implement the inclusive education policy?

Table 2.2

Answer type	Teachers	Principals*	PMT & PST*
Yes	88 (64.7%)	9	2
Not sure	31(22.8%)	1	1
No	9 (6.7%)	0	0
No answer	8 (5.9%)	0	0

* Percentages are not included due to the small number of respondents

The majority of role players responded positively to this question. The principals were particularly positive in this regard. It should be noted, however, that a substantial minority (23%) were unsure.

5.3 How has the project helped teachers to understand and implement the policy?

The different role players responded in very similar ways to this question. The key trends in their responses revealed the following main points.

The introduction of White Paper 6 through the project had a very positive effect on the attitudes of teachers to 'diversity', in particular, to people with disabilities. It also raised awareness of the 'right to education' of learners with disabilities, and, in particular, that they need to be admitted to mainstream schools.

Many of the responses indicated that the introduction of this policy through the project had helped them to address various learning challenges in the classroom. The link between inclusive education and the outcomes-based education (OBE) curriculum had also become clear.

Lastly, the establishment of ISTs has occurred through this project, and this links directly with the requirements of White Paper 6.

5.4 Why did the project not help teachers to understand and implement the policy?

The teachers and principals answered this question, highlighting four main points. They felt that they had not received enough training (and therefore exposure to White Paper 6). The point was also made, however, that they did not understand the policy because they had not attended the workshops that were provided. Some teachers felt that they were too overloaded. And, lastly, some principals indicated that there were no resources to address some of the barriers to learning.

5.5 Suggestions for how teachers can be helped to understand and implement this policy

Suggestions made by the different role players included five main points. More training of all role players, including the ISTs, was important. This training needs to challenge negative attitudes and provide practical guidelines for identifying and addressing barriers to learning. School management and governance structures need to be assisted to develop inclusive school policies. Basic infrastructure and materials resources need to be provided to equip schools to address the challenges that face them. The Department of Education, primarily through the district structures, needs to provide more support to schools to implement inclusive education.

5.6 Summary and Comment

The responses in this section highlight that this particular process of policy implementation is viewed very positively. Aspects that seem to have been particularly successful include the development of respect for diversity, and recognition of the location of inclusive education within the OBE framework. In some schools it seems that the national policy has been integrated into the school policy. In line with White Paper 6, the ISTs have been established in most of the schools, and the district has begun to address the need to develop a District Support Team (DST) – both imperatives from White Paper 6.

Two major issues that these findings do highlight, however, are (a) that all the role players are experiencing ‘policy overload’ – which highlights the need for an integrated approach to training and other strategies used for policy implementation, and (b) that the lack of ‘basics’ in the schools and their surrounding communities presents the Department of Education, and all role players involved in the provision of education or support, with many challenges.

6. OBE-INCLUSIVE EDUCATION INTEGRATION

6.1 Introduction

This section of the evaluation focused on the extent to which teachers had made the link between ‘inclusive education’ and the OBE curriculum. This is considered to be a key determinant of successful implementation of inclusive education in South Africa, particularly insofar as the curriculum challenges are concerned.

The findings from the research are presented in two main sections: teachers’ views, and then the opinions of the three materials assessors who examined the materials with this question in mind.

6.2 Teachers’ Views

6.2.1 Has learning about inclusive education and overcoming barriers to learning helped teachers to ensure that all learners are included in and benefit from the OBE curriculum?

Table 2.3

Answer type	No of teachers	% of total responses (to question)
Yes	100	73.5%
Not sure	16	11.8%
No	10	7.4%
No answer	10	7.4%

6.4 Summary and Comment

The responses outlined in this section reveal a very positive response, indicating that the teachers in the pilot schools have made the link between inclusive education and OBE, and are integrating this into their classroom practice. This understanding on the part of the teachers is very evident in the words and phrases they use when discussing this issue. For example, they say that they have learnt that all learners can learn; that they should be given a chance to do so at their own pace; that teaching needs to be learner-centred; that teachers need to be flexible; and that they need to work together. Their constant use of the concepts of 'barriers to learning' also shows that they understand that the challenge of inclusive education relates directly to their core purpose, that is, to promote effective teaching and learning.

One particular practical challenge that arises from this data, however, is that of teaching large classes. Teachers are obviously still struggling a great deal with this challenge.

7. PRACTICAL IMPLEMENTATION OF INCLUSIVE EDUCATION IN THE CLASSROOM

7.1 Introduction

In this section of the questionnaire completed by teachers only, the aim was to find out whether teachers felt that they had been helped to implement inclusive education in the classroom. Teachers were asked to indicate in which areas of the curriculum (see Table 2.5 below) they felt this had been achieved, and then to add other areas if appropriate.

7.2 Has the project helped teachers to learn practical ways of overcoming barriers to learning in the classroom?

Table 2.4

Answer type	No of teachers	% of total responses (to question)
Yes	98	72.1%
Not sure	11	8.1%
No	10	7.4%
No answer	17	12.5%

A large majority (72%) responded positively to this question, indicating that they had been helped to implement inclusive education in their classrooms.

7.3 In which aspects of the curriculum has this occurred?

Table 2.5

Areas where new skills have been learnt	No of teachers*
The content of what is taught	52 (53%)
Teaching and learning methods	77 (78.6%)
Methods of assessment	76 (77.6%)
The organisation and management of the classroom	72 (73.5%)
The organisation and management of the timetable	42 (42.9%)
Other areas	15 (15.3%)

* The percentage reflects the responses from the 98 teachers who indicated that they had learnt practical ways to overcome barriers to learning in the classroom (see table above). Most of the respondents indicated that they had learnt new skills in more than one area.

Table 2.5 shows that the skills learnt through this project were mainly in three areas, although the other areas also received a substantial response. The three main areas include (a) teaching and learning methods, (b) methods of assessment, and (c) classroom management. It is interesting to note that the area that received the least emphasis (according to the teachers) was that of 'time-tabling'.

Other areas that were identified by some of the teachers included details about various methods to make the lesson interesting, including learning to use various teaching aids (e.g. overhead projector, videos etc.). Classroom management and assessment were also highlighted, in particular, the teacher's own attitude and response to learners, with a particular focus on the importance of individual assessment to understand the learners more and being able to encourage them to learn at their own pace.

7.4 What do teachers still need to learn to overcome barriers to learning in the classroom?

The few teachers who responded to this question highlighted the need for more training.

7.5 Summary and Comment

It seems that most teachers have been helped to identify and begin to address barriers to learning in their classrooms. Their responses also indicate that they have realised that this involves making changes to all aspects of the curriculum. The one aspect of the curriculum that obtained the least positive response related to time-tabling. As mentioned above, this is not too surprising as changes to the time-table

usually affect the whole school, and relate to the overall organisation and management of the school. This is a very important area to explore further, however, as flexibility in the overall management of the curriculum through time-tabling is a central strategy for accommodating different learning needs.

8. SCHOOL AND DISTRICT MANAGEMENT AND GOVERNANCE

8.1 Introduction

This section of the evaluation focused on various aspects of school and district management and governance. Principals, the PMTs and PSTs were asked to respond to questions that were aimed at exploring whether existing school management and governance structures understood the implications of the new policy on inclusive education for their schools; whether any specific structures and procedures had been established in the schools and district to support inclusive education; and what needs to be put in place to facilitate the implementation of inclusive education.

8.2 School Management and Governance

8.2.1 Does the School Governing Body (SGB) understand the need and implications for implementing inclusive education in the school?

Table 2.6

Answer type	No of principals	% of total responses (to question)
Yes, they do understand/are aware	8	80.0%
It is difficult to say/not sure	1	10.0%
No they do not understand/are not aware	0	0%
No answer	1	10.0%

According to the majority (80%) of the principals, their SGBs do understand what is expected of them in terms of the policy on inclusive education.

8.2.2 Have any structures and procedures been established in the school to implement inclusive education practices?

Table 2.7

Answer type	No of principals	% of total responses (to question)
Yes	7	70.0%
Not sure	0	0%
No	2	20.0%
No answer	1	10.0%

Seven of the principals say that they have set up structures and procedures to support the implementation of inclusive education in their schools. Although this is a large majority (70%), a substantial minority (3 or 30%) of principals said 'no', or did not answer the question at all. This does indicate that some schools have not addressed this challenge yet.

Structures and procedures that have been established, according to the principals who responded, include:

- the establishment of ISTs, some of which work directly with School Management Teams (SMTs)
- the inclusion of members of the above teams in the broader HIV/AIDS awareness campaign
- specific committees in the schools to address particular issues, e.g. assisting children with disabilities in the community and admissions
- development of school policies to address various aspects of inclusion (e.g. admissions, HIV/AIDS)
- renovations to schools to make them more accessible
- development of a vegetable garden, involving parents, which helps to address some of the effects of poverty

8.3 District Management and Support

8.3.1 What has been put in place in terms of management structures and procedures to sustain the implementation of inclusive education in the district and province?

In their responses to the above interview question, the PST and PMT in this province said that the following structures and procedures had been put in place to support the implementation of inclusive education in the district and province:

- The pilot schools involved in this project are in the designated 'nodal' area within which district development work will occur over the next few years

and is included in the national implementation plan for White Paper 6. This means that the province can build on what has begun in this district, and take the development of inclusive education further in these schools and district.

- Some mainstream schools have mobilised around inclusive education. This makes other schools aware of what is happening and what the new policy is all about. The pilot schools are sharing their experiences with other schools in the district.
- The College of Education lecturers who have helped with training and research in this project can continue to be used to support the implementation of inclusive education in the district and province.
- ISTs have been established in the pilot schools.
- The district support team structure has been initiated but it needs a lot of support and capacity building.
- The new district model around service delivery, which includes the development of a management team in each circuit, is being developed in this province. These teams will include the implementation of inclusive education as one of their areas of focus.

8.3.2 What needs to be put in place to sustain the implementation of inclusive education at these levels?

The following suggestions were made by members of the PST and PMT:

- There needs to be sustained commitment from leadership at the provincial level. *“Taken the problems experienced in this area in the past, some direct intervention may be needed to ‘force’ people to become more involved in the implementation process – it requires more than an attitudinal change.”*
- There needs to be a coordinator, a ‘champion’, a ‘driver’ of inclusive education to ensure that all relevant role players do take this seriously. This could be pursued through dedicated posts or structures – at all levels (provincial and district).
- The district education officials have a crucial role to play in supporting the implementation process, in particular, through supporting the schools. This includes proper, integrated strategic planning processes at this level.
- Extra posts need to be created and existing posts need to be re-distributed to address the massive challenges of providing support to schools. Existing personnel who can continue to play a crucial role are the College of Education lecturers. Also, existing ‘support services’ personnel who have been involved in this project should become more active in the district support teams.
- The capacity that has been developed in the PST and PMT therefore needs to be used for the purposes of continuing the implementation process.
- A structure for intersectoral collaboration, based on the PST experience, should be set up to provide district support.
- There is a need for more training. In particular, training for inclusive education needs to be integrated into OBE training.

- The consortium members (universities, non-governmental organisations (NGOs) and disabled people's organisations (DPOs) should remain involved to support the implementation of inclusive education through training and action research. This should include training of 'support personnel' (e.g. psychologists) so that they can play the kind of role expected by the new policy.
- The special schools/resource centres need more support.

8.4 Summary and Comment

Although some structures and procedures have been put in place to support the ongoing implementation of inclusive education in this district, there are many challenges facing this district and province in this regard. One of the ways of addressing these challenges is to optimally use the human and material resources that have been developed through this project – to take this process further in the district itself, and to help other districts in the province to follow suite. This includes looking at how the existing employees of the Department can be optimally used to support the implementation of inclusive education, including the College of Education lecturers, and the traditional 'special needs' and 'support services' personnel.

It has been suggested that the PST developed during this pilot project should be used as a basis for developing a DST in this area. Other areas can also learn from their experiences.

One of the key issues highlighted around the management processes needed to support the implementation of inclusive education relate to the need for integrated strategic planning at different levels of implementation. This includes developing integrated training programmes for educators and support personnel. The continued use of higher education institutions, NGOs and DPOs should be considered as an important element of this. This includes bringing them in to address the capacity building needs of the district support providers.

9. SUPPORT NEEDS AND PROVISION

9.1 Introduction

In this section the views of all role players who responded to this section of the questionnaires on support needs and provision are summarised. Most of the focus in this section is on the development of the ISTs in the schools: whether they were established, and how well they are functioning at the moment.

9.2 Teachers' Views

9.2.1 Do you know what kind of support you can get inside and outside of your school to help you to overcome barriers to learning?

Table 2.8

Answer type	No of teachers	% of total responses (to question)
Yes	92	67.6%
Not sure	0	0%
No	27	19.9%
No answer	17	12.5%

68% of the teachers answered 'yes' to this question. While this is a majority, a substantial minority (32%) answered either 'no' or gave no answer. This suggests that there are still many of these teachers who do not know how to obtain the support they need to overcome barriers to learning in their schools.

9.2.2 Has the Institutional-level Support Team (IST) been established in the school?

Table 2.9

Answer type	No of teachers	% of total responses (to question)
Yes	109	80.1%
Not sure	5	3.7%
No	8	5.9%
No answer	14	10.3%

There was also a very positive response to this question, suggesting that the ISTs have been established in most schools.

When the teachers who indicated 'no' in their questionnaire (8) were asked if they knew why the IST has not been established, all said that they did not know why it had not been established.

9.2.3 Are you a member of the IST?

Table 2.10

Answer type	No of teachers
Yes	51
Not sure	0
No	63
No answer	22

Less than half of the teachers who responded to this question were members of the IST. Many of them did not answer the question, which could mean that the number ('no') is larger. This finding is not surprising as it would be expected that, in any school, it would only be a minority of teachers who serve on the IST.

9.2.4 Is the IST supporting teachers to overcome barriers to learning?

Of the teachers who indicated that they were members of the team,

- 48 indicated that they feel that the IST is helping teachers to overcome barriers to learning in their classrooms
- 4 indicated that they did not feel the IST was helping teachers to overcome barriers to learning
- 11 respondents were unsure.

These responses show a positive response from the IST members about the role that the IST is playing in the school. However, since the total number of responses to the question (63) exceeds the number of team members (51) it is difficult to know if the 'no's and the 'unsure's are members of the IST or not.

The members of the IST indicated a number of ways in which they feel that the IST is assisting teachers in their schools. The IST is providing training (workshops) to teachers to identify and address barriers to learning. The IST also assists teachers to overcome barriers to learning by getting them to share ideas with one another and problem-solve together. Many of the members indicated that the involvement of parents on the ISTs helped with this process. Lastly, the IST also helps teachers to refer learners to specialists (e.g. social workers) when they need extra help.

Only one IST member responded to the question of why the IST is not supporting teachers, indicating that s/he needed more support to help other teachers.

9.2.5 If you are not a member of the team, do you know how to get help from the IST?

Of the teachers who are not members of the IST (63)

- 53 said that they knew how to get help from the IST to support them
- 13 said that they were not sure how to get help from the IST

Once again, the majority of teachers who are not members of the IST indicated that they knew how to get help. However, once again the number of responses to this question (66) exceeds the number of teachers who said that they were not members of the IST (63). Despite these small discrepancies in the data, it would appear that most of the teachers in the pilot schools do know how to get support from the IST. This suggests that the ISTs are playing a valuable role within the schools.

9.3 Principals' Views

9.3.1 Establishment and functioning of the ISTs

As with the teachers, the majority of principals said that ISTs had been set up in their schools. There was however more ambivalence among the principals than the teachers about how well the ISTs are supporting teachers. Those principals who said that the IST was functioning well gave the following examples of how they were supporting teachers:

- Teachers had been informed of the role of the IST in the school and know how to make use of it.
- The IST helps teachers to problem-solve together.
- When problems are addressed, the IST draws in other teachers when necessary.
- Outside facilitators are called in when the IST cannot solve a problem.

When asked why the IST is not functioning well, the one principal who responded said that the IST members did not receive the proper training to deal with some of the problems.

9.3.1 What support does your school need from the Department of Education officials to implement inclusive education?

The principals indicated a number of areas of need in response to this question. This included:

- The Department needs to understand the barriers to learning being experienced at schools.
- Schools need support from the Department.
- The Department should provide training support to schools.
- Schools need human and material resources to address these barriers. This includes basic infrastructure such as electricity.
- The 'community' should be brought in to help the schools with projects (e.g. vegetable gardens)
- The different government departments need to work together to provide support to schools.

9.3.2 What support does your school need from parents?

Two major points arose from responses to this question. First, the principals felt that parents should become more involved in the school, and they should be introduced to inclusive education. Second, parents can help schools to include learners with disabilities by bringing them to the school.

9.3.3 What support does your school need from organisations and people in the community?

There was strong support from principals for the involvement of NGOs and DPOs in the school programmes. They have valuable resources and skills to share with schools. In particular it was suggested that they could help in making the community aware of inclusive education; they can help with the training programmes; and they can be involved in specific projects, e.g. safety, vegetable gardens, and so on.

9.4 Role of the Special Schools/Resource Centres

The principals of the two special schools/resource centres involved in the project both said that the project had helped them to understand their role in developing an inclusive education system. However, they differed in their responses as to how much the project had assisted them, with one principal saying 'yes' it had helped them, 'but not very much'.

In response to the question: **“What support do special schools/resource centres need from Department of Education officials to understand and develop their support roles?”**, the responses from the two principals concerned related to the need for more human resources, to enable the two special schools/resource centres to both teach and provide support to other schools.

9.5 Views from the Project Support Team (PST) and Project Management Team (PMT)

9.5.1 Do teachers know about the support they can get to overcome barriers to learning in their classrooms?

Of the three members of the PST who completed questionnaires, two indicated that teachers were aware of the support they can get, while the other member said that they did not.

9.5.2 Have the relevant departments and organisations set up any structures and procedures to support schools to implement inclusive education?

All the members said that they had set up structures and procedures to support schools.

The only structure referred to in response to this question, however, was the National Association of School Governing Bodies which is working closely with the Department of Education to train SGBs at schools.

9.5.3 Has the project helped the relevant departments and organisations to work together collaboratively to support schools?

There were mixed responses to this question. This suggests that individual members have had different experiences around this issue during the duration of the project.

Only one example of how collaboration has been developed was provided. This referred to the positive experiences of the Department of Correctional Services in working with the Department of Education through this project.

9.6 Summary and Comment

ISTs have been established in most of the pilot schools. They seem to be doing a good job of supporting teachers to address barriers to learning, particularly through collective problem-solving and linking teachers to other sources of support. Teachers and principals seem to view the functioning of the ISTs in the same way, although a large minority of principals are not sure if these teams are functioning well or not.

At district level, the PST members feel that they have set up structures and processes to support schools, and this is confirmed by the teachers' responses as they seem to know how to get support. With regard to the internal working of the PST, however, there are mixed responses with regard to whether or not it has facilitated good collaboration. This is an area that needs addressing as the district develops its formal DST.

Responses from the principals regarding their need for support highlight that they would welcome, and need, support from the Department, parents and their local communities. Their responses about what and how this could be further pursued are minimal, however. This may be because of 'questionnaire fatigue'. However, it is worrying that they are not giving more thought to this as these 'support providers' could help them a great deal to address the many barriers to teaching and learning in their schools.

Lastly, with regard to the two special schools/resource centres in this pilot project, the principals suggest that, to varying degrees, they have been supported to review their roles and functions through this project. But this is clearly an area that needs more focus, including addressing their request for resources so that that can teach and provide support to neighbouring schools. This request needs to be carefully examined to see exactly what the needs are in this regard.

10. EDUCATOR DEVELOPMENT

10.1 Introduction

In this section, the focus is primarily on an assessment of the materials that have been developed through this project in the Eastern Cape Province. The findings presented below are drawn from the separate reports of two of the materials assessors (full reports to be sent to provinces concerned). After the presentation of

the summary of their findings under various headings, this section of this chapter outlines the teachers' evaluation of the training and materials.

10.2 Record of Progress and Products

The materials assessed in this evaluation included a Facilitator Guide and three units making of a Module for Educators. The module is entitled "Addressing Barriers to Learning and Development". The three units include:

- An introduction to barriers to learning and development
- A curriculum for inclusion
- Addressing barriers to learning

10.3 Accreditation of Programmes

According to the materials assessor focusing on the acceptability of the module for accreditation purposes, this module does not yet meet the full requirements regarding credit points and hours related to this (refer full report). Although the authors of the module claim that it does fulfill the 12 credit/120 hours requirement, the evidence of how these hours are covered is not given. This may only require an adjustment to the way in which this requirement is described, and not necessarily impact on the programme itself.

With regard to qualification level, the authors of these materials have targeted Level 5, National Professional Diploma in Education (NPDE). The materials do meet the standards of this level, but it is suggested that, as the NPDE is a short-term intervention in the country, the module should rather target the Post-Graduate Certificate in Education (PGCE), which is also Level 5, or the Advanced Certificate in Education (ACE), which is Level 6. Thus, the module would have longer-term relevance in the country.

10.4 Congruence with White Paper 6

The materials do appear to be congruent with the principles and framework of inclusive education in South Africa as outlined in White Paper 6. This is done through providing educators with extracts of the White Paper and other key documents that outline this approach, and providing opportunities, through the programme, for engaging with this framework in different ways. Also, the paradigm shift, from a medical/deficit model to a systems change approach, is clearly explained in the text.

Two suggestions for improvement relating to congruence with the policy are (a) that the explanations of the conceptual framework be simplified to ensure understanding and development of insight into the paradigm shift, and (b) that there is consistency in the terminology used.

10.5 Congruence with OBE Curriculum Framework

The assessment of the Educator Development materials for this province indicates that direct links between inclusive education and OBE are made in the training process. The one assessor reported that this linkage is made explicit through the two being presented together, and makes the statement that the idea that “*inclusive education promotes OBE*” is clearly made in the text. The training approach adopted in the workshops also models the OBE approach. “*It incorporates OBE outcomes and assessment criteria, and indicates how the course relates to the OBE framework of qualifications*”, and “*it incorporates appropriate learner centred approaches and workshop activity, portfolio, journal writing and action research activities that are consistent with an OBE approach.*”

10.6 Relevance

The materials are relevant to the needs of the target audience. This is revealed particularly through the approach used in the workshops themselves, where the educators’ own background knowledge and experiences are drawn upon, and through connections directly made with the expressed needs of the educators concerned. The case studies that are used also make these connections.

10.7 Some Other Curriculum Issues

10.7.1 Accessibility

The relevance of the programme and materials to the teachers’ needs, as mentioned above, helps to make it accessible to them. With regard to the language medium of the texts concerned, attempts have clearly been made to make it linguistically accessible. There are some good examples in the text of how this has been achieved through the use of tables, dialogues, case studies and so on (refer full report).

With regard to the presentation of the material, this is well done in this module. Clear overviews of the programme, specific sessions and tasks are provided; the different sections are well structured and logical, and are linked to one another through reviews and reports-backs; clear headings and icons provide ‘sign-posts’ for the educator; and the use of different font sizes for headings, as well as text boxes for particular purposes, makes for easier reading.

There are, however, areas for improvement that have been highlighted by the materials assessors. Much of the text is dense and complex. This is mainly because of the use of sophisticated language (and examples of this are given in the full report), and complex sentence structure. The OBE jargon, which is often abstract and complex, also creates a barrier to easy understanding. It is proposed that this module be ‘translated’ into ‘easy-read’ to accommodate the language accessibility needs of the target audience, who are mostly ‘English second-language’ educators. This means that more accessible every-day English vocabulary can be used and sentences made simpler without compromising the meanings of the text. In addition to the actual language accessibility, the volume of the information makes it difficult to ensure that educators are able to engage meaningfully with the issues presented.

This is particularly important when one expects people to ‘make a paradigm shift’ – which requires time and constant engagement with new ways of thinking.

A central issue in the development of these programmes and materials is the extent to which, and the way in which theory and practice are linked. In this module, both aspects are taken seriously, creating a ‘hybrid approach’. While this attempt to address ‘both needs’ is good, the materials could be made more accessible by placing less emphasis on the theoretical/academic aspect and more on practical orientation. These are all challenges that face trainers and educators throughout the country (and the world!), and that can be addressed in the further development of these texts.

10.7.2 Aims/outcomes

The module programme has clearly stated aims and outcomes, as well as assessment criteria, and these are congruent with the OBE approach, thereby ‘modeling’ OBE for the educators concerned.

There are two areas that need further work. First, there is a need to check consistency of outcomes and assessment criteria with the Standard Generating Body for Inclusive Education – when it has completed its own work in this regard. And, second, the requirements to address all seven roles of the educator, as outlined by the Norms and Standards for Educators, need to be addressed as not all the roles are covered in this module.

10.7.3 Content

This module is a very useful resource for inclusive education, providing relevant and essential information. Some aspects are covered well, e.g. alternative approaches to teaching and assessment for learners who need it, and the use of learners/peers as tutors and buddies in the classroom.

Some aspects, however, have been only superficially covered, and the theoretical underpinnings of many of the issues are weak. The section on IQ testing, currently placed at the end of the module, is not adequately dealt with given the importance of this issue in education in South Africa. This includes the lack of provision of alternatives, such as dynamic or interactive assessment procedures. (It is acknowledged, however, that this is a national and international weakness!). Another area that has not received enough attention is that of the teaching of reading strategies for those who experience mild learning difficulties.

10.7.4 Teaching strategies

This programme and material reflects, in fact it models, the OBE approach in various ways. It is learner-centred; it is inclusive in its approach (drawing from the educators’ own experiences); it supports an active approach to learning, and provides a variety of activities to keep educators engaged; it does this in an interactive and participatory way, building in reflective practice throughout, and providing opportunities for problem-solving through activities such as case studies. Finally, a further strength of this programme is the realistic time frames that are set for the

workshops concerned, providing opportunities for proper engagement with the content.

The main weaknesses identified in the materials assessment process related to (a) problematic referencing between the Facilitator’s Guide and the Educators’ material, making presentation of these workshops more difficult, (b) a lack of sufficient theoretical foundation to many of the issues – including a lack of information on the importance of ‘mediated learning’ and ‘cooperative learning’ approaches within the classroom.

Lastly, the video that was briefly assessed was considered to be interesting and potentially useful, but would need instructions on how to use it to make the most of the learnings that could be drawn out from it.

10.7.5 Assessment procedures

The assessment procedures used in this module are clearly and well presented, and are relevant and creative. A variety of activities such as tasks during the workshops and ongoing development of portfolios and journals are used. At the moment, the assessment tasks are only formative or developmental in nature. To meet university requirements, summative assessment tasks should also be developed.

10.8 Feedback from Teachers

10.8.1 Was the training programme useful for the teachers?

Table 2.11

Answer type	No of teachers	% of total responses (to question)
Yes	100	73.5%
Not sure	8	5.9%
No	13	9.6%
No answer	15	11.0%

The teachers responded very positively to this question, with 74% saying that the training programme was useful to them.

10.8.2 What parts of the training programme was most useful?

The most common response to this question was that the training had helped the teachers to identify and overcome barriers to learning. Other key issues highlighted are briefly outlined below.

- Videos and other methods were used to demonstrate how to address barriers to learning. Most of the training was very practical.
- They learnt to respect differences (“*all kinds of learners*”) and to provide opportunities for learners to work at different paces to accommodate their different learning needs
- Teachers became aware of the rights and needs of learners with disabilities
- They also learnt a lot about how to respond to learners who have been abused
- The link between the action research approach and the training was very useful
- The strategy of clustering schools for training was useful

10.8.3 Which parts were not useful or least useful?

The main area that was highlighted by the teachers was that the training was not practical enough; it did not demonstrate/show how to address barriers to learning (e.g. drug abuse).

10.8.4 Were the learning materials helpful?

Table 2.12

Answer type	No of teachers	% of total responses (to question)
Yes	79	58.1%
Not sure	26	19.1%
No	14	10.3%
No answer	17	12.5%

The majority of teachers (58%) responded positively to this question. While this is a large number, a substantial minority (42%) said ‘no’ or were unsure of how to respond to this question (‘not sure’ or ‘no answer’). What is interesting to note is that those teachers who responded positively (58%) were fewer than those who said that the training was very useful. This suggests that for some teachers, while the training was very useful, they did not feel as positive about the materials used in the training programmes.

10.8.5 In what ways has this material been helpful?

The five main points that were highlighted by teachers in response to this question were:

- The material was helpful to teachers when they wanted to know what to do to address a particular barrier to learning in their classroom (they used it as a practical 'reference' point)
- The material was therefore very practical and relevant
- Teachers were taught how to use handouts effectively
- The video demonstrations were very helpful in terms of responding to the needs of learners
- The use of stories was very helpful

10.8.6 Why have the materials not been helpful?

The responses of teachers to this question were very mixed. The three main points that were highlighted were, first, that the materials were not accessible enough; second, that the video was not available at the school; and third, that the materials did not help the teachers to use Sign Language sufficiently, and therefore to respond to Deaf learners.

10.9 Summary and Comment

The materials assessors and teachers responded very positively to the training and materials developed in this pilot district project. The consortium members involved in the development and ongoing review of the materials should be congratulated for the extent to which they addressed the needs of the target 'audiences' concerned. In particular, the fact that the content and methodology employed in these programmes are in line with White Paper 6; the efforts that the team took to use interactive and participatory approaches to the development and presentation of these programmes with educators and other role players; and the extent to which they were able to present the materials in a reasonably accessible form, are highly commendable. It is clear that the bringing together of the different expertise brought to this venture by the 'tripartite' community partnership in the consortium (universities, community organisations (NGO & DPO), and the Department of Education), was a major reason for the success of this process.

In the teachers' and materials assessors' views, however, there is still some work to be done to make this material acceptable at both 'university' and 'community' level. This includes sorting out the few remaining issues relating to accreditation for the universities, and the proposed translation of the texts into 'easy read'. This latter challenge will need the involvement of people who have skills to do such a 'translation', as well as those role players who can bring the right 'language' and 'experiences' to bear on the exercise. One major challenge in such an exercise is ensuring that the 'power relations' between the different members of such a team are equalised to ensure that all voices are heard and taken into account in the further development of the material.

11. CAPACITY BUILDING OF SUPPORT PROVIDERS AND MANAGERS

11.1 Has the project provided adequate capacity building to the Project Management Team and the Project Support Team to enhance their capacity to provide support to the schools?

There were mixed responses to this question, with only one of the members saying that s/he had received adequate capacity building.

11.2 What training/capacity building is still needed for district officials and members of the support team to be able to provide adequate support to the schools?

Three main areas were raised in the response to this question. In terms of areas of training needed, it was suggested that a more comprehensive approach to addressing needs relating to disability was needed. In terms of personnel to provide support, the need for more specialists was highlighted. The need for "*someone to drive from top-down*" was also raised.

11.3 Assessment of Capacity Building Materials

One of the material assessors from the national evaluation research team evaluated all the training programmes and materials for workshops held with the school management and governance structures, the DST, and the community. While some of her focus was on broad 'curriculum' issues (the what and how of what was covered), the main emphasis in this assessment was on the relevance of the programmes and materials in relation to the White Paper 6 on inclusive education, and in relation to local needs. She also focused on the accessibility of the material for the target participants identified. The findings outlined below are a summary of her views on these issues.

11.3.1 Congruence with White Paper 6

In general terms the programmes and materials appeared to be congruent with the main principles and framework of White Paper 6. In particular, the development of the DSTs and ISTs is in line with the recommendations in this policy. The programmes and materials do not, however, seem to provide enough information and insight into what is expected of the various role players on these structures – what their roles and functions are or should be. There was also not enough information about the different kinds of barriers to learning that could be experienced, and how to address these. The materials tended to focus only on a few, albeit relevant, issues. Finally, while most of the terminology used in the materials are 'in line' with the principles of the new policy, there are instances where it is too medically orientated (e.g. using words like 'client' and 'treatment' when talking about working with people with disabilities), and other times when it is unintentionally negative (e.g. using words that depict the experiences of a person with epilepsy in a negative rather than positive way). On the whole, though, the material does make an attempt to shift

attitudes towards an understanding of inclusive education that is congruent with White Paper 6.

11.3.2 Relevance

The material assessed uses examples and case studies that are relevant to the realities of the local context within which the project has been pursued. It answers questions that are realistically likely to be asked by the different role players in that area, including parents. The focus on only a few issues does, however, result in the programme and materials not providing a comprehensive and critical analysis of the kinds of barriers to learning that one could expect to have to address in schools. At the moment, the programmes focus primarily on addressing the needs of learners with disabilities, with very little focus on psychosocial issues that impact on teaching and learning. In addition to this broadening of the understanding of 'barriers to learning', there is a need for an analysis of broader societal influences on teaching and learning and how these are often at the root of some of the problems that arise.

While the material does potentially address some of the questions and needs of the role players being targeted in this project, it does not adequately engage with the parents, particularly within the context of the SGB training. There is a need for further development of this material to ensure that parents are engaged with as equals (and attitudes as well as accessibility of presentation is important here) and to ensure that they are equipped to play their role in helping schools to become more inclusive.

With regard to the 'target' for these programmes, it is suggested that programmes and materials directed at the learners themselves should also be developed. This is particularly important given the central role they have to play in supporting and teaching one another.

11.3.3 Accessibility

The language used in the materials is relatively simple and therefore accessible to the role players concerned. There is room for improvement in this regard however, where the development of 'easy-read' materials should be the aim when further developing these programmes and material.

More use of case studies, examples, visuals and drama would also make these texts more accessible. There are examples of good use of these techniques in some parts of the material. Diagrams can also be useful, but in some instances in the materials assessed, the diagrams tend to hinder rather than enhance understanding (e.g. the diagram providing an overview of the project itself).

In terms of the overall structure of the materials, a contents page as well as clearer and more accurate internal referencing (to sources being referred to) would be helpful. Lastly, at the moment the writing format used for the materials tends to be more 'report' orientated, rather than 'educationally' orientated. This highlights the need for the structure and writing style to be appropriate to the educational intent of the workshops concerned.

11.3.4 Other curriculum issues

The programmes and materials assessed reveal some creative approaches to facilitating capacity building of the role players concerned, although, as mentioned above, there was not enough focus on parents in this regard. In particular, good attempts are made to obtain community cooperation in the programme aimed at that broad constituency. This programme clearly values community participation in the provision of support to schools, and highlights the need for 'working together' to achieve this.

11.4 Summary and Comment

The findings of this section are based on minimal formal input from the PST and PMT in this province, as their questionnaire response rate was small and not substantially addressed in the focus group interviews.

The mixed responses to the question of whether or not members of the teams at the district level felt that they had received sufficient capacity building support during this process suggest different experiences during the project. It does seem, however, that capacity building of the district (and higher levels) remains a major challenge for the future. This is particularly important as the implementation of inclusive education in the schools is very dependent on the ongoing and appropriate support from the districts.

With regard to the capacity building programmes and materials developed in this district, the assessment reveals a positive picture. It has been suggested, however, that, while this is a "*good start*", work needs to be done to further develop these materials so that they can be used in this and other districts in the province. This includes the need to develop programmes and materials for parents and learners (in their role of 'peer-supporters') in particular.

12.CONCLUSION

The challenges that have faced this province have been enormous, not least of these being starting to implement a policy before it has even been publicly released (the White Paper 6 was only released in July 2001), and the ongoing 'moving around' of staff at all levels of the Department. Overall education restructuring has therefore created both barriers and possibilities in the pilot project. In the face of this, the project co-ordinator, consortium, and all those involved in the process, have done a tremendous job.

This pilot project has been successful – to varying degrees - in all areas of its work. It has managed to help teachers to integrate inclusive education, within the OBE framework, within their classroom practices. In particular, it has gone some way down the road to helping them to understand and address the barriers to learning they face in their schools. Principals have, to a large extent, become aware of the challenges of inclusive education and have begun to implement the key principles in their schools. This has included the setting up of ISTs in most of the schools, and these structures seem to be supporting teachers in the ways outlined in White Paper 6. The project has, through its focus on implementing inclusive education, created

very positive school-community relationships in many instances. At district level, some success has been achieved in bringing together education department officials and other sectors, to look at how to provide a more integrated support to schools. They have certainly become more aware of what the challenges relating to this are, and, in many instances, have achieved success through particular projects. There does not seem to have been much involvement of the provincial-level officials in this project, but there is an awareness that their involvement and support is essential to make this work. And then, finally, the work that has been done on developing the programmes and materials in this province are an excellent basis for further development – to ensure that all role players' needs are addressed.

In light of the time-frame and cost constraints of this project, it has been an enormous success! However, there are many challenges that still remain to be addressed. The teachers and principals want more training (which is fair, given the challenges of implementing inclusive education in their schools). The ISTs and SGBs need further capacity building and support to play their crucial roles in supporting inclusive education in the schools. The district education officials and other support providers need much more capacity building, which needs to include ensuring that they are all clear about their roles, functions and responsibilities in the intersectoral teams, and are supported in their attempts to 'learn to work together'. The need to find a way to 'address the basics' while or through the process of implementing inclusive education needs to be addressed at all these levels.

All of the above and other challenges are 'normal', and need to be built into ongoing efforts to implement inclusive education in this district and in the province as a whole. It is worrying (to the evaluators) that not enough has been done to plan for and ensure the sustainability of the work that has been done in this province. It is hoped that this will be pursued however (the respondents certainly were aware of this challenge), and that the whole district (not just the pilot schools), the province, and country as a whole will benefit.

CHAPTER THREE

KWAZULU-NATAL PROJECT

1. INTRODUCTION

The research conducted as part of the second phase of the National Quality Evaluation in KwaZulu-Natal Province included the following methods of data collection:

- The development and administration of separate questionnaires to teachers in the pilot schools, the principals of pilot schools and members of the Project Management Team (PMT) and Project Support Team (PST)
- Focus group interviews by the national quality evaluators with members of the PMT and PST
- Focused assessment of the educator development and capacity building materials by three assessors.

The questionnaires and interview schedules used are attached at the end of the report as Appendix B and C respectively. The separate reports by the materials assessors for this province will be sent directly to the province for their attention.

The consortium leader, assisted by the project-co-ordinator and other members of the project team in the province, took responsibility for ensuring that the teachers and principals at the schools completed the questionnaire. The PMT and PST questionnaires were handed to the members of the teams by the project co-ordinator and collected by the national quality evaluators directly after the focus group interviews held on 7 and 8 August 2002.

The findings of the research process undertaken in this province and presented in this chapter are drawn from the following sources of primary data:

- Returned questionnaires from 9 principals
- Returned questionnaires from 196 teachers
- Returned questionnaires from 11 members of the PST/PMT
- Interview notes from focus group interview with 3 members of the PST¹
- Interview notes from focus group interview with 9 members of the PMT
- 3 reports from materials assessors

As indicated in Chapter One the findings of the research are presented under headings that relate to the original aims and objectives of this final phase of the national quality evaluation.

¹ It should be noted that there is some overlap between members of the PMT and PST

2. BENEFITS OF THE PROJECT

2.1 Introduction

All stakeholders were asked to say in the questionnaires whether they felt that the project had been of benefit to the pilot schools involved. They were also asked to clarify their answer by saying what they felt the specific benefits have been. If they felt that the schools had not benefited they were also asked to explain their reasons for saying this. If the respondents said yes to this question (that is, the school had benefited from the project), they were asked to clarify how much they felt the school had benefited.

2.2 Have the pilot schools benefited from their involvement in the project?

Table 3.1

Answer type	Teachers	Principals*	PMT & PST*
Yes, definitely	89 (45.4%)	4	9
Yes, but not very much	83 (42.3%)	4	2
Not sure	19 (9.7%)	0	0
No	2 (1.0%)	1	0
No answer	3 (1.5%)	0	0

* Percentages are not included due to the small number of respondents

The majority (88%) of the teachers responded positively to this question. However, half of these (42%) said that the schools had not benefited much from the project ('yes', but not very much). A similar response was received from the principals. It is interesting to note that the PST and PMT were more positive than the teachers and principals in this regard.

2.3 How have the schools benefited?

In summary, the following most common responses across the role players were made with regard to how the schools have benefited from this project:

- All the role players involved have become aware of what inclusive education is all about, and have changed their attitudes towards people who are 'different', in particular, people with disabilities.
- They are now aware of barriers to learning that cause exclusion of learners, and are more able to address many of these.

- The schools concerned have become more physically accessible to learners with physical disabilities.
- Schools have received more resources through this project.
- The community has become more involved in the life of the school and all have benefited as a result.
- Teachers have learnt to work together more – teamwork has therefore been supported and developed.
- The discipline in the schools has improved as a result of this project.

2.4 Why have the schools not benefited?

The few responses received to this question highlighted that there has not been enough training to equip educators to develop inclusive schools. The point was also made that, in most instances, learners with disabilities had not yet been admitted to the schools, so the teachers have not yet faced the practical challenges relating to this. Lastly, a number of internal school problems were cited as being barriers to implementing inclusive education.

2.5 Summary and Comment

Clearly, the schools in this pilot project have benefited. They have benefited directly – through becoming aware of the challenges of implementing inclusive education – and indirectly, through the ‘spin-off’ of ‘learning to work together’, and to address the difficult disciplinary challenges that these schools are obviously facing. Reasons given for why schools have not benefited relate to the lack of ‘basics’ (resources and conditions for effective functioning) in the schools, which obviously makes it difficult for schools to develop into good teaching and learning sites. One of the ‘basics’ that seems to be creating problems in these schools is internal school dynamics, including problematic relations between teachers and teachers and management.

3. WHAT WORKS?

3.1 Introduction

In the questionnaires teachers, principals and members of the PST and PMT were asked to comment on what parts of the project had worked the best. This question was also asked of the PMT and PST members in the focus group interviews. Getting people to reflect on what had worked in the project and why, was seen as a very important aspect of the evaluation process. It was hoped that through their involvement in the project role players would identify ‘best practices’ in implementing the inclusive education policy. Learning lessons from the project to share with the rest of the country and members of the Southern African Development Community (SADC) has been a central aim of the project.

The findings shared below are presented in a synthesised way, drawing together the main views of all role players involved in the evaluation research. A slightly more detailed presentation of some of these ‘good practices’ are outlined in Chapter Six in this report. It should also be noted that, shortly after finalising this report, a ‘booklet’ on ‘Learning from Practice’ will be compiled and distributed through the Department

of Education to all provinces and SADC countries, thereby sharing the 'good practices' (including difficulties experienced) that have emerged during this project.

3.2 What Worked?

In response to the question of what worked well, and why, in the implementation of inclusive education through this project, the following key areas were highlighted by the various role players. As the areas were common across the role players, these are presented in an integrated way.

Awareness of the Policy on Inclusive Education

- The attitudes of all the role players changed positively as a result of being introduced to the new policy.
- They now understand what inclusive education means, and all role players have responded very positively to its basic principles.
- A non-jargoned discourse (way of thinking and talking about) around inclusive education has been developed as most of the teachers involved have never been exposed to the 'special needs' discourse.
- The approach used to implement policy in this project – a combination of 'top-down' policy guidelines and 'bottom-up' action research processes – was very successful.

In the School:

- The school-based approach to training, where the workshops were integrated into the staff development programmes in the school, was successful. The involvement of the Institutional-Level Support Teams (ISTs) in this process was a particularly important aspect of this.
- The training, including the materials, received by the teachers was very positively viewed.
- Teachers were helped to address some psychosocial barriers to learning, in particular, abuse, and the effects of HIV/AIDS.
- Teachers were also taught how to include learners with disabilities in their schools and classrooms.
- This project, and the process of implementing inclusive education, had a generally positive 'spin-off' or ripple effect on the general development of the school, including helping to develop more collaborative work in the school, and helping with issues like school discipline.
- Many of the schools have become more accessible to learners with physical disabilities.
- School policies have been changed to include the principles of inclusive education.

At the District Level:

- Intra-Departmental (within Education) collaboration has improved. One example of this collaboration has been around physical planning, where the inclusion of the key person in charge of this area in the province has resulted in the development of physically accessible schools in this district, and has made this section of the Department more aware of the challenges of building inclusive teaching and learning environments.

- The ‘ripple effect’ of the implementation of inclusive education through this project has also been felt by other ‘levels of education’ in the Department, in particular, early childhood development (ECD) and adult basic education and training (ABET).
- Committed and sustained involvement of provincial education officials in this project has had a very positive effect.
- The project has shown the importance of having a ‘champion’ or dedicated person(s) to drive the process of implementation.
- Intersectoral collaboration – across government departments, has also been improved. An example of this has been projects developed by the Health and Education Departments within the ‘health promoting schools’ strategy.
- The PST and PMT have provided a very committed and balanced team to provide support to schools. They feel that they are more confident to implement inclusive education now.
- The fact that most of the ‘support personnel’ were from the district itself helped their work with schools.

Special Schools/Resource centres:

- The workshops have helped the special school/resource centre to understand its role in supporting inclusive education in the district.

Community Partnerships:

- Very positive community-school partnerships were developed through this process. In particular, non-governmental organisations (NGOs) and disabled peoples’ organisations (DPOs) played a central role in the training and development of inclusive practices in the schools.
- One example of positive intersectoral collaboration where NGOs played a central role has been around victim support around the issue of abuse.
- The involvement of the DPOs in the process has had a *“major attitudinal change among people ... they tend to confront their own negative attitudes and fears with very positive outcomes ... and through the involvement of DPOs, disabled people and parents become ‘un-hidden’ in the communities.”*
- Parents are very happy that children with disabilities are being included in the schools ... *“they thought this would never happen ... even those who don’t have money can now take their children to school.”*
- The Community-Based Rehabilitation Facilitator (CRF) who was employed to help the special school/resource centre has played a very important role in developing positive community-school relationships in the area.

3.3 Summary and Comment

There are many positive, ‘success’ stories to share from this province. Many of these are included in Chapter Six in this report, which focuses on learning from ‘good practice’. These success stories come from all the levels of implementation, including the classrooms, the schools as a whole, the school-community partnership, and the district. While there are clearly still many challenges at all these levels, it seems that

major strides have been made to facilitate an openness to, and confidence in implementing inclusive education in this district.

One particularly valuable learning from this district has been around the development of an 'indigenous' discourse (way of thinking and talking about) around inclusive education. Through the excellent training and support provided, the teachers have found ways to talk about and practice inclusive education 'in their own language', and this language 'fits' with the language and direction of the outcomes-based education (OBE) curriculum framework. It is also a language that links inclusive education with the rights of all learners, especially from very poor communities, to education provision

Many success stories have emerged from this project. This includes the involvement of Physical Planning in the project which has resulted in the development of many accessible schools in the area, and has had many other 'spin-off' gains as well (refer Chapter Six for more details about this); the development of very positive school-community partnerships; the success of the health promoting school strategy in addressing various barriers to learning; support towards the development of a special school/resource centre in its new role as a resource center; and, last but not least, the very valuable training programmes and materials that have been developed.

It is interesting to note that, when highlighting barriers to learning, the two main social issues highlighted in this project are physical and sexual abuse, and the various effects of HIV/AIDS. Also highlighted in this district is the importance of admitting learners with disabilities to 'mainstream' schools so that the teachers and schools are 'forced' to address this teaching and other curriculum challenges that this raises. What is positive, in this district, is that all the role players concerned have been, at least theoretically, prepared to meet this challenge, and want to meet this challenge!

4. DIFFICULTIES AND CHALLENGES

4.1 Introduction

One of the main questions often asked by people and countries who want to know how to implement inclusive education is "what was difficult and how did you overcome those difficulties?". This section of the evaluation deliberately focuses on the difficulties that the various role players experienced when trying to implement inclusive education in this province. This information can be very useful when planning for further implementation in this district and beyond.

This information, obtained from the questionnaires and interviews, is synthesised across role players as they tended to highlight the same issues.

4.2 Key difficulties experienced through this project in the implementation of inclusive education

When responding to the questions relating to this section of the evaluation, the following key issues were highlighted:

In the School:

- Internal dynamics between teachers and between teachers and the school management, have made it difficult to implement inclusive education properly in the schools.
- While conflict resolution and discipline were considered to be issues that had been positively addressed through this project, some teachers indicated that these were still problematic issues.
- Many teachers do not feel properly prepared to address the many psychosocial barriers to learning, and to include learners with disabilities. The latter point was worsened by the fact that learners with disabilities have not yet been admitted to the schools.
- There was a feeling that some principals still had a negative attitude towards people with disabilities.
- Teachers feel overwhelmed by all the demands on their time.

Accessibility:

- Some of the schools are still inaccessible.
- There has been some “*over-capitalisation*” (spending more money than its worth!) on trying to make some of the very poor schools accessible.
- The infrastructure in and around the school makes accessibility an ongoing problem.

Teacher Training:

- The main complaint from all role players was about the time in which the training took place. It seems that this occurred during school time, which resulted in classes being disrupted.
- Teachers feel that they need more practical guidelines to address the barriers to learning.
- The non-attendance of some teachers at the workshops and some teachers leaving them early, was seen as a problem by other teachers
- When training occurred through the clustering of schools, this was considered to not be helpful.

Support Provision:

- Schools need support to implement inclusive education, particularly in the development and positive working of the ISTs.
- The district support personnel have not been adequately trained to provide this support, and they feel overloaded with work.
- The project has been negatively affected by the ‘restructuring’ and moving around of personnel within the Department of Education.
- Clarity about roles and responsibilities of each of the district team members has not been achieved.

- Some feel that there is not enough commitment to the implementation of this policy from the district office.
- Inclusive education has not been integrated into the central planning and activities of the Department of Education. In particular, inclusive education has not been integrated into the OBE programmes. Also, there is no coordination around the HIV/AIDS programme. Other directorates need to be involved in the implementation of inclusive education.
- There has been a lack of synchronicity between the district project and the national policy, which only came out half-way through the project. The province and district are still waiting for the practical guidelines being developed at national level to implement the policy.
- Commitment and involvement of senior management in the province still needs to be obtained.
- Community support is there, but it has not been optimally developed. It is also not easy to involve the community in the life of the school.
- The special school /resource centre was included in this project very late, so they have only just begun to address the many challenges they face.
- Expectations have been raised through this project, but these will be difficult to meet.

Human Resource Challenges:

- *“The project has shown that building inclusive education is very expensive with regard to the utilisation of human resources and time spent by education officials. It will be very difficult for the education department to provide the human resources and time needed to reach all the schools in the province.”*

Sustainability:

- Concern was raised by some about how this process will be sustained in the future. *“Who is going to take over? There has been no planning for this ... there will be a gap in implementation ... we don’t know what is going to happen after September ... many feel that it is a problem when a project comes and goes, and this thinking will be reinforced if nothing is in place after September.”*
- If the existing ‘drivers’ of inclusive education (those involved in this project) are not involved in the ongoing development of this implementation, there will be a problem with sustaining what has been developed.

4.3 Summary and Comment

Many challenges have been highlighted through this project. This includes addressing the lack of ‘basics’ in the schools – in terms of material resources, as well as an effective culture of learning and teaching in the schools. While this is a major challenge that cannot be under-estimated in South Africa, it need not stop the implementation of inclusive education. Actually, it can be argued that inclusive education could be used as a strategy to address these basics, and this project shows that this is possible!

With regard to the training and capacity building: while this has obviously been a success in this district, all relevant role players are saying that they need more, and that it needs to be more practical – to help them to respond to the very practical challenges in the classrooms and schools.

Reflection on the district and provincial levels has revealed the need for more effort to integrate inclusive education into the central strategic planning and programmatic processes at these levels, ensuring that all directorates recognise that this is their responsibility. Although there have been some very positive developments in this direction, there is still a lot of work to be done to obtain commitment to the implementation of this policy at these levels. Linked to all of this is the need to look at how the gains of this project can be ‘sustained’ and taken further – in the district and beyond.

Lastly, the need for more financial, material, and human resources has been highlighted as crucial to the success of the implementation of this policy. This is a challenge that must be addressed, but it needs to be examined in the context of how existing resources can be better used to address the needs.

5. ROLE OF PROJECT IN POLICY IMPLEMENTATION

5.1 Introduction

This section of the evaluation focused on drawing out lessons that can be learnt from this pilot project for general education policy implementation. In this project, a combination of strategies was used to implement White Paper 6 on inclusive education. This included a ‘top-down’ approach reflected by the introduction of new education policy, as well as a ‘bottom-up’ approach which focused on action research in the pilot schools and classrooms. The questions raised in the research were aimed at finding out what the different role players’ experiences were in relation to the success of these strategies: did they actually help them to implement the policy on inclusive education?

5.2 Did this project help teachers to understand and implement the inclusive education policy?

Table 3.2

Answer type	Teachers	Principals*	PMT & PST*
Yes	141 (71.9%)	7	10
Not sure	37 (18.9%)	2	1
No	13 (6.6%)	0	0
No answer	5 (2.6%)	0	0

* Percentages are not included due to the small number of respondents

Most of the role players said 'yes' when responding to this question. However, a substantial minority (19%) of the teachers were not sure. This may relate to their not knowing how to answer the question, or they are just not sure whether or not the project helped them to understand and address the challenges that the new policy has raised for them.

5.3 How has the project helped teachers to understand and implement the policy?

Key points that were raised by all the role players in response to this question included:

- Teachers now understand the new policy on inclusive education, and are aware of how this affects their own school policies.
- The need for "*every child to have the right to learn at his own pace*" has been highlighted.
- It has helped them to understand, identify and address barriers to learning.
- They have all become aware of the need to 'work together' to address these barriers to learning.
- Relationships between the schools and community have been positively developed.

In addition to the above common themes, the teachers indicated that their attitudes towards people with disabilities and with HIV/AIDS had become more positive. They were also now more able to deal with problems relating to abuse and discipline.

5.4 Why did the project not help teachers to understand and implement the policy?

Only some of the teachers responded to this question. They said that they had not received enough training; were not sure of the policy; and that they were concerned that illegal practices around not admitting learners whose parents cannot afford school fees had not yet been addressed.

5.5 Suggestions for how teachers can be helped to understand and implement this policy

Suggestions provided include:

- More time and training would help. More practical training is particularly important here.
- There is still a need to change the negative attitudes some teachers and principals have towards learners with disabilities.
- More practical policy guidelines would help with implementation.
- When learners with disabilities are admitted to schools, teachers would need to learn how to accommodate them.
- Internal dynamics in the school that interfere with proper teaching and learning need to be addressed.

5.6 Summary and Comment

It is interesting to note that the findings from the above section show that the very aspects of the project that are considered to be positive, are also considered to still be the key challenges facing the district in its attempt to implement this policy. For example, although the educator development programmes were found to be very useful, teachers feel that they need more training. Although attitudes have changed for the better, there is also a need for more work in this regard. This highlights the fact that the time-frame for this project has only allowed for the 'beginning' of a process. The radical transformation that is required in peoples' hearts and minds, and in the structures within which they practice, needs time!

6. OBE-INCLUSIVE EDUCATION INTEGRATION

6.1 Introduction

This section of the evaluation focused on the extent to which teachers had made the link between inclusive education and the OBE curriculum. This is considered to be a key determinant of successful implementation of inclusive education in South Africa, particularly insofar as the curriculum challenges are concerned.

The findings from the research are presented in two main sections: teachers' views, and then the opinions of the two materials assessors who examined the materials with this question in mind.

6.2 Teachers' Views

6.2.1 Has learning about inclusive education and overcoming barriers to learning helped teachers to ensure that all learners are included in and benefit from the OBE curriculum?

Table 3.3

Answer type	No of teachers	% of total responses (to question)
Yes	137	69.9%
Not sure	27	13.8%
No	24	12.2%
No answer	8	4.1%

The majority (70%) of teachers responded positively to this question, but a substantial minority (26%) said 'no' or that they were 'unsure'.

6.2.2 Examples of how learning about inclusive education has helped teachers to teach the new OBE curriculum

Teachers who responded to this question provided a number of examples of the links which they are now making between inclusive education and the OBE curriculum. These included:

- The belief that *“every learner has the right to learn at their own pace”* was expressed by many of the teachers.
- *“OBE and inclusive education work hand in hand to include all learners”* was stated by a number of the teachers. Teachers are more aware of the need to provide equal opportunities for learners in their classrooms.
- Many teachers said that both OBE and inclusive education are learner-centred. This includes understanding individual learner needs.
- The value of group work for learning was highlighted.
- They are now able to understand and address barriers to learning.
- In particular, many teachers became aware of the effects of home life on the learners’ school performance.

6.2.3 What would help teachers to make sure that all learners are included in and benefit from the new OBE curriculum?

In response to this question (by those teachers who said that they had not been helped to see the link between inclusive education and OBE), the following key points were raised:

- The problem of overcrowded classrooms needs to be addressed.
- Teachers need for resources, including materials.
- They also need more training – *“it won’t happen overnight”*.
- Behavioural problems will need to be addressed.

6.3 Views of the Project Management Team

6.3.1 Has the project assisted the Department to integrate inclusive education into its central strategic and management processes, including linking it with OBE?

Of those members of the PMT who answered this question, the majority (5) answered positively. However, the others (4) said that this had not occurred, or they were not sure. This indicates mixed experiences or views of the success of this integration process. The other data seems to suggest that there is still substantial improvement needed in facing this challenge.

6.3.2 Why has it not been integrated into the Department’s strategic planning and management processes?

The responses to this question highlighted that the pilot project has only involved a small number of schools, and that this affects the way the Department sees things. Another member of the PMT said that senior planners do not understand OBE. Most

of the responses, however, used this opportunity to highlight that none of this will work without the necessary material and financial resources!

6.4 Materials Assessment

The material assessed in this evaluation reflects a commitment to and modeling of the key principles of OBE. The link between inclusive education and OBE is not, however, made directly in the content of the material. That is, teachers are not overtly shown how the two connect and how they should be integrated.

It is interesting to note, however, that in the analysis of the question answered by teachers (refer section 6.2.2 above), they give very clear examples, evidence actually, of the integration of inclusive education and OBE, and these examples show that they have made the right connections.

6.5 Summary and Comment

The findings from this section of the evaluation suggest that the teachers have made the link between inclusive education and OBE. This is clear when you look at the way in which they talk about this link, highlighting the fact that they have become more aware that every learner has the right to learn at her/his own pace; that understanding learners' individual needs is linked to the learner-centred approach of OBE; and that cooperative learning through various forms of group techniques is a valuable way to engage with the learning process. The materials assessors support this finding, although the point is made that, while the material models the OBE approach, the links between inclusive education and OBE are not directly made in the texts.

At the district or departmental level, the responses relating to the extent to which inclusive education has been integrated into the OBE framework suggest that there is an awareness of this link. However, the findings also reveal that this integration needs to be pursued further, particularly through ensuring that the link is made at the strategic planning level.

7. PRACTICAL IMPLEMENTATION OF INCLUSIVE EDUCATION IN THE CLASSROOM

7.1 Introduction

In this section of the questionnaire completed by teachers only, the aim was to find out whether teachers felt that they had been helped to implement inclusive education in the classroom. Teachers were asked to indicate in which areas of the curriculum (see Table 3.5 below) they felt this had been achieved, and then to add other areas if appropriate.

7.2 Has the project helped teachers to learn practical ways of overcoming barriers to learning in the classroom?

Table 3.4

Answer type	No of teachers	% of total responses (to question)
Yes	145	74.0%
Not sure	26	13.3%
No	18	9.2%
No answer	7	3.6%

74% say that the project has helped them to learn practical ways to overcome barriers to learning in their classrooms.

7.3 In which aspects of the curriculum has this occurred?

Table 3.5

Areas where new skills have been learnt	No of teachers*
The content of what is taught	57 (39.3%)
Teaching and learning methods	98 (67.6%)
Methods of assessment	84 (57.9%)
The organisation and management of the classroom	102 (70.3%)
The organisation and management of the timetable	48 (33.1%)
Other areas	25 (17.2%)

* The percentage reflects the responses from the 145 teachers who indicated that they had learnt practical ways to overcome barriers to learning in the classroom (see table above). Most of the respondents indicated that they had learnt new skills in more than one area.

The main areas identified are classroom management, teaching and learning methods, and assessment. The content and the time-tabling areas received some response in terms of skills learnt, but less so. The time-tabling area is predictably low given that this is the area that requires the most radical changes because it usually affects the overall management of the school.

Other areas that were identified by some of the teachers included a particular emphasis on *“learning that corporal punishment is not the best form of discipline”*.

Some teachers also said that they had learnt more about poverty, abuse and HIV/AIDS as barriers to learning. One teacher also said that *“educators can also be barriers to learning”*.

7.4 What do teachers still need to learn to overcome barriers to learning in the classroom?

Many teachers said that they needed more practical demonstrations of how to overcome barriers to learning in the classroom. This related to their request for more practical training which should focus on teaching methods that promote inclusive practices.

7.5 Summary and Comment

The areas of the curriculum within which the teachers say they have learnt the most skills are classroom management and teaching methods. They also indicated that they had learnt a lot about addressing psychosocial barriers to learning. Despite the many ways that they say they have been assisted to understand and address various barriers to learning, there is still a clear need for more training. The request for more practical training, in particular, the use of demonstrations on how to ‘do it’, was clear. In the face of the very difficult challenges that face teachers in the classrooms in South African schools, this is a fair request. Teachers need to develop confidence in their complex roles in the classroom, and ‘watching’ others ‘role-model’ what is expected, is a very effective method.

8. SCHOOL AND DISTRICT MANAGEMENT AND GOVERNANCE

8.1 Introduction

This section of the evaluation focused on various aspects of school and district management and governance. Principals, the PMTs and PSTs were asked to respond to questions that were aimed at exploring whether existing school management and governance structures understood the implications of the new policy on inclusive education for their schools; whether any specific structures and procedures had been established in the schools and district to support inclusive education; and what needs to be put in place to facilitate its implementation.

8.2 School Management and Governance

8.2.1 Does the School Governing Body (SGB) understand the need and implications for implementing inclusive education in the school?

Table 3.6

Answer type	No of principals	% of total responses (to question)
Yes, they do understand/are aware	5	55.6%
It is difficult to say/not sure	3	33.3%
No they do not understand/are not aware	1	11.1%
No answer	0	0%

Although just over half (56%) (the majority) of the principals said that the SGB does understand the implications of the new policy for the school, a large minority (44%) do not think so, or are not sure. This suggests that some schools are more prepared at this level than others.

8.2.2 Have any structures and procedures been established in the school to implement inclusive education practices?

Table 3.7

Answer type	No of principals	% of total responses (to question)
Yes	4	44.4%
Not sure	0	0%
No	5	55.6%
No answer	0	0%

The principals' responses to this question are also mixed, with 56% saying that structures and procedures have been not been put in place to support inclusive education, and others (44%) saying that they have. Once again, this suggests that the schools have had different experiences of success or failure in this area of development in the project.

Those principals that said that structures and procedures had been set up identified three areas: the establishment of the IST; the appointment of a convener to coordinate the inclusive education programme in the school; and teacher representatives to update the SGB on a regular basis.

8.3 District Management and Support

8.3.1 What has been put in place in terms of management structures and procedures to sustain the implementation of inclusive education in the district and province?

The interviews with the PST and PMT in this province highlighted that the following structures and procedures had been put in place to sustain the implementation of inclusive education in this area.

- Schools have been made safe and accessible.
- New posts have been created in the specialist support services section of the Department (PGSES) to provide support to the schools in the province.
- Within the Department, a good working relationship between the education management staff and the specialist support services has been developed. This will help with providing more integrated support to schools.
- ISTs have been established in the schools (however they need ongoing support to survive)
- The consortium (universities and NGOs) want to continue to give support through training.

8.3.2 What needs to be put in place to sustain the implementation of inclusive education at these levels?

Other strategies that need to be followed to sustain the implementation process include:

- A 'coordinating committee on inclusive education' at provincial level (mirroring the national structure)
- *"There is a need for directives from 'high up' to be given to ensure that all sectors are involved ... senior management commitment within Education is crucial in this regard"*.
- There is a need for commitment from other government departments. The Department of Education should follow this up, and include looking at ways in which the different 'calendars' of the different government departments can be linked to facilitate collaborative work. It was suggested that existing Inter-Ministerial Committees be used for collaborative work, but, it was stated that *"they seem to disappear at ground level!"*
- Finding a way to include the pilot schools in the provinces district development plan, which includes the implementation of White Paper 6, even though they do not fall into the designated 'nodal' areas.
- The District Support Team (DST) needs to be properly established in this area.
- Creation of a 'dedicated post' to 'drive' the development of inclusive education – at all levels (district, regional and provincial). It was suggested that *"this post must be located within the education management services and not necessarily within PGSES"*. It therefore *"needs to be mainstreamed"*.

- There is a need for more posts to be dedicated to this process. This includes specialist posts at the special schools/resource centres.
- Where new posts have already been filled, they need to be trained to support the implementation of inclusive education.
- The Department should look at how to use those who have developed greater capacity (knowledge and expertise) to implement inclusive education through this project.
- Better use of existing PGSES staff should be made to support the implementation of inclusive education.
- Dedicated funding needs to be put aside for the re-furbishing of schools to make them all accessible.
- There is a need for an 'exit plan' for this project.

8.4 Summary and Comment

Although there have clearly been many attempts to create a sustainable process within the schools and at district level – with many examples being given of how this has been done – it is clear that not enough planning has gone into considering how this process of implementation can be further pursued – in this district, or beyond. This remains a major short-term and medium-term challenge for the Department. Besides good management, including integrated strategic planning, this requires the allocation of human, material and financial resources to ensure that the gains made in this project are not lost.

9. SUPPORT NEEDS AND PROVISION

9.1 Introduction

In this section the views of various role players on support needs and provision are summarised. Most of the focus in this section is on the development of the ISTs in the schools: whether they were established, and how well they are functioning at the moment.

9.2 Teachers' Views

9.2.1 Do you know what kind of support you can get inside and outside of your school to help you to overcome barriers to learning?

Table 3.8

Answer type	No of teachers	% of total responses (to question)
Yes	137	69.9%
Not sure	0	0%
No	47	24.0%
No answer	12	6.1%

Although a majority (70%) said that they do know how to get the support they need to overcome barriers to learning, a substantial minority (24%) answered 'no' to this question. There are therefore a number of teachers who are not aware of the support that they can get.

9.2.2 Has the Institutional-Level Support Team (IST) been established in the school?

Table 3.9

Answer type	No of teachers	% of total responses (to question)
Yes	158	80.6%
Not sure	17	8.7%
No	16	8.2%
No answer	5	2.6%

A large majority (81%) of the teachers said that an IST has been set up in their schools. However 17 teachers (9%) said that they were not sure if an IST had been established and 16 (8%) said the structure had not been established. This suggests that some teachers may be unaware about the establishment of the IST in their school or it may not yet have been established. The 8% who said that an IST had not been set up in their school did not give any reasons why this had not happened yet.

9.2.3 Are you a member of the IST?

Table 3.10

Answer type	No of teachers
Yes	63
Not sure	0
No	101
No answer	32

Most of the teachers who responded are not members of the IST. A substantial number are, however (63). This ratio is to be expected in any school, so reflects the real situation well.

9.2.4 Is the IST supporting teachers to overcome barriers to learning?

Of the teachers who indicated that they were members of the team (63),

- 62 indicated that they feel that the IST is helping teachers to overcome barriers to learning in their classrooms
- 11 indicated that they did not feel the IST was helping teachers to overcome barriers to learning
- 13 respondents were unsure.

These responses show a very positive response from the IST members about the role that the IST is playing in the school. However, since the total number of responses to the question (86) exceeds the number of team members (63) it is difficult to know if the 'no's and the 'unsure's are members of the IST or not.

Examples of how the IST is supporting teachers included:

- Regular collective problem solving occurs through the IST, and this helps teachers to address problems in their classes.
- This process therefore helps teachers to overcome barriers to learning in their classrooms. The example of dealing with learners who have been abused was raised by a number of teachers, as was the problem of discipline.
- Through this collective problem solving, teachers are learning to work together as a team.
- The IST provides training for teachers.
- The IST helps the school to make connections with specialist support personnel (e.g. social workers).

Those who said that the IST was not supporting teachers gave four main reasons in response to this question. First, teachers indicated that teachers do not report their problems to the IST. Second, it was suggested that *"the idea of an IST has not been driven"* in the school. Third, teachers do not communicate with one another, and, fourth, teachers are not trained to provide this support in the school.

9.2.5 If you are not a member of the team, do you know how to get help from the IST?

Of the teachers who are not members of the IST (101)

- 47 said that they knew how to get help from the IST to support them
- 46 said that they were not sure how to get help from the IST

The findings show a very mixed response, with half knowing (47) how to get help and the other half not knowing (46).

9.3 Principals' Views

9.3.1 Has an IST been established at the school?

The majority of principals (7 out of 9) responded positively to this question, but 2 said that the IST had not been established in their schools.

9.3.2 Is the IST functioning well – supporting teachers to address barriers to learning?

There were mixed responses to this question from the principals, suggesting that, in their opinion, some ISTs are functioning well while others are not.

In response to the question of why and how the IST has been supporting teachers, only two responses were given. The one highlighted that the IST provides useful workshops on inclusive education, and the other said that s/he had been helped to develop an action plan for addressing discipline problems in the school.

Reasons for the non-functioning of the IST in some schools included that teachers had not received enough training; that there were too few staff in the school; and that teachers did not have the time to do this properly.

9.3.3 What support does your school need from the Department of Education officials to implement inclusive education?

In response to this question, principals said that they needed resources to implement inclusive education. This included material, financial and human resources (staff!) They also highlighted the need for the infrastructure within and around the school to be strengthened as there are many basic resources that are lacking which create a barrier to the implementation of inclusive education. One principal said that *“the burden of welfare must be taken away from educators”*, suggesting that the psychosocial barriers to learning are difficult for the teachers to handle.

9.3.4 What support does your school need from parents?

Only one suggestion was given in response to this question. It was suggested that parents can provide resources, including donations to address ‘basic’ needs in the school. One principal said that the *“moral support from parents is low”*, suggesting a need for parents to be involved in positively supporting the school.

The lack of responses to this question was disappointing, given the invaluable and central role that parents can have in supporting schools to address barriers to learning.

9.3.5 What support does your school need from organisations and people in the community?

In response to this question, the main request was for support in providing resources to address basic infrastructural needs. Some of the responses suggested a concern about possible *“interference”* of organisations and other government departments in the life of the school: *“They need to see the difference between support and interference”*, and the need for some barriers to be addressed by others: *“the Department of Welfare needs to take responsibility for their duties”*.

9.4 Role of the Special Schools/Resource Centres

In response to the question: **“Has the project helped the special schools involved to understand their role as a resource centre in the inclusive education system?”** the following responses from the two principals were noted:

The two principals of the special schools/resource centres involved in this project both responded positively to this question, but the one was tentative in her/his response (yes, but not very much).

With regard to the support that the special schools/resource centres need from the Department of Education officials to understand and develop their support roles, three suggestions were made. The principals indicated a need for more staff, and, in particular, for *“one full-time official per disability”* who has gained experience in special schools to be appointed at the higher levels. The other main suggestion was about the need for accessibility issues to be addressed, including providing transport support between the special schools/resource centres and other schools.

9.5 Views from the Project Support Team and Project Management Team

9.5.1 Structures and procedures that have been set up to support schools to implement inclusive education in their area

The majority (9 out of 12) of PMT/PST members said that structures and procedures had been set up to support the schools. It was also felt that the teachers are aware of how they can access support to assist them in overcoming barriers to learning.

There was some ambivalence, however, about how successful the project had been in facilitating collaboration between relevant departments and organisations. Some people felt that despite the constraints, positive working relationships between the Department of Education and other government departments such as Health, Welfare and Correctional Services had been developed.

The following structures and procedures have been set up to support the schools:

- Committees for educators have been formed (ISTs).
- Support structures involving different stakeholders have been formed.
- In particular, it was reported that a provincial Inclusive Education Coordinating Committee is being formed.
- There are no special schools/resource centres in the district, so the Department is preparing three ‘mainstream’ schools to become ‘full-service’ schools. These schools will play a central role in supporting schools in the region.
- Other sections of the Department (ABET and ECD) are taking up relevant issues, e.g. identifying ‘out of school’ learners.
- Many buildings are being made accessible for learners with physical disabilities.

- Various advocacy programmes and campaigns are being launched within the province.
- There is provision for the training to teachers so that they can implement inclusive education.

9.6 Summary and Comment

It seems, from the responses to this section of the evaluation, that most teachers and principals seem to know how to obtain support. The ISTs have been established in the pilot schools, and, according to the teachers in particular, some of these are functioning well. The way in which they are functioning – providing training and facilitating collaborative problem-solving – is in line with the White Paper 6 framework of support.

With regard to the kinds of barriers to learning that the teachers and ISTs are trying to address, it seems that psychosocial barriers, including so-called disruptive behaviour (causing discipline problems), poverty, physical and sexual abuse, and the effects of HIV/AIDS, are a priority in these schools. Despite some feelings that this should not be the role of educators or schools to address, it seems that they have no option but to find strategies to address these issues that clearly impact on the teaching and learning process.

Although the special school/resource centre involved in this pilot project was only recently brought into the process, it seems that a great deal has been achieved in trying to help this school explore its new role as a resource center. Many important initiatives have started to emerge as a result. The further support of this and other special schools/resource centres and ‘full-service’ schools needs to be built into any further attempts to implement inclusive education in this district.

At district level, some structures and procedures to support schools in the ongoing implementation of inclusive education have been put in place, but there is recognition that not enough attention has been given to sustaining the process.

10. EDUCATOR DEVELOPMENT

10.1 Introduction

In this section, the focus is primarily on an assessment of the materials that have been developed through this project in the KwaZulu-Natal Province. The findings presented below are drawn from the separate reports of the two materials assessors who focused on the educator development programmes and materials (full reports to be sent to provinces concerned). After the presentation of the summary of their findings under various headings, this section of this chapter outlines the teachers’ evaluation of the training and materials.

10.2 Record of Progress and Products

The programme developed for educators through this project consisted of a Module, with four specific Units. The Units covered the following areas:

- Inclusive education policy
- Working towards inclusive schools
- Inclusion and health promoting schools
- Inclusion responses to curricula

Various supplementary materials were provided with these Unit documents.

10.3 Accreditation of Programmes

According to the materials assessor who focused on this aspect in the evaluation of these materials, the Module does not yet meet the full requirements of 12 credits/120 hours. Two credits (20 hours) are currently unaccounted for. Addressing this issue may only require an adjustment to the way in which the 'notional learning hours' are described.

With regard to qualification level, this Module is acceptable at university level, and could be used in either National Professional Diploma in Education (NPDE) or Advanced Certificate in Education (ACE) programmes. The one area that needs to be addressed in order to comply with regulations is the development of criteria for evaluation of the educators' performance and competencies. Assignments or tasks also need to be assessed for symbols or marks, and the proposed weighting of these needs to be given.

Not all of the seven educator roles, as outlined in the Norms and Standards for Educators, have been covered in this Module. This issue also needs to be addressed.

10.4 Congruence with White Paper 6

The issues highlighted in this Module are congruent with the priorities outlined in White Paper 6. The content of this material is therefore relevant to the policy framework. Where appropriate, extracts from relevant policy documents and legislation are provided.

The terminology used in these materials is generally congruent with the discourse of inclusive education in South Africa. There are one or two instances, however, when problematic language (e.g. mental handicap) is used. In this regard, alternative terms (e.g. intellectual or cognitive difficulties) should be found.

10.5 Congruence with OBE Curriculum Framework

The Module material itself reflects a commitment to and modeling of the key principles of OBE. The link between inclusive education and OBE is not, however,

made directly in the content of the material. That is, teachers are not overtly shown how the two connect and how they should be integrated.

It is interesting to note, however, that in the analysis of the question answered by teachers about linking inclusive education and the OBE curriculum framework (refer Section 6), they give very clear examples, evidence actually, of the integration of inclusive education and OBE. Their examples show that they have made the right connections.

10.6 Relevance

Both materials assessors agreed that the content of the material is relevant to the needs of the teachers, and to the local area concerned. The case studies that have been included in these texts were considered to be particularly relevant to local needs.

A note of caution was raised by one of the assessors however. This related to the kinds of stories or case studies we focus on when dealing with particular issues. The example given was in Sub-Unit 3.1 which focuses on sexual abuse. In this case study, the girl is a victim and boys are perpetrators. The assessor says *that “this needs to be balanced with a boy as victim, and not necessarily a man as perpetrator ... while sexual abuse is rife, and men are often perpetrators, some women are as well .. the materials should be careful to avoid misleading, untrue and unfair gender stereotyping.”* While the views expressed in this statement may well be contested, the point that all materials assessors made when sharing their views on the materials across the provinces is that we must be careful about the examples that we use. We need to make sure that we do not, unintentionally, support negative stereotyping of any kind.

10.7 Other Curriculum Issues

10.7.1 Accessibility

The relevance of the material to local needs makes this material very accessible. The language accessibility, however, still needs some work, although there are some very good examples (e.g. Unit 4) of a coherent, integrated, interactive and accessible approach. This Unit also demonstrates an integration of an OBE approach without the jargon!

In many cases the language is too dense, complex and sophisticated, and, when substitute terms (using different words for the same thing) are used, this can confuse the reader (examples of all of these are provided in the separate report).

The presentation of the material is generally well done, improving accessibility in various ways. In particular, the structure, layout and glossary help. Areas for improvement in this aspect of the materials include: ensuring that the cross-referencing between the Facilitators' and Educators' Guides correspond; providing a contents page; linking activities in a more logical way (there are instances when this did not occur); and simplifying the numbering system.

The supplementary material is useful but it is dense in its present form, and at times, there are no references. The question of whether or not to translate these documents into 'easy-read' is raised here (where more accessible every-day English vocabulary can be used and sentences made more simple without compromising the meanings of the text). The opinion of the materials assessors is that this should happen, but resources would need to be provided to support such an exercise.

10.7.2 Aims/outcomes

Consistency of the outcomes provided in this programme still needs to be checked with the Standard Generating Body for Inclusive Education which is still in the process of development.

Otherwise, the outcomes are linked to the critical outcomes outlined in the National Curriculum of C2005, and there are instances where relevant specific outcomes (e.g. linked to HIV/AIDS) are evident. This Module may, however, need revision in the light of the recent Learning Area Statements that have come out of the revision of the C2005 framework.

In terms of accessibility, the outcomes as they stand at the moment read very densely as difficult and abstract terms are used. These could benefit from a 'translation' into 'easy-read'.

10.7.3 Content

As mentioned previously, the content is relevant to the policy framework. In this regard, it covers all the key areas outlined in White Paper 6, providing a comprehensive, informative and generally excellent resource on inclusive education for South Africa.

The materials also appear to be relevant to the expressed needs of the teachers in this project.

Some weaknesses identified by the assessors included the following:

- Although some important teaching and learning theories are addressed in the materials and modeled in the workshops, it is felt that there are some gaps in this regard. One assessor makes particular mention of mediated learning and co-operative learning as theories that could have been given more attention. The assessor argues that giving more attention to these areas “ *would be useful in developing teachers’ mediational teaching style and to gain an understanding of their own cognitive processes as well as that of the learners whom they teach.*”
- Unit Two contains a section on “children with disabilities”. This section is substantial and contains very important and relevant content. However, it is felt that the materials could be improved by integrating the issues addressed in this section more substantially throughout the full module.
- The area of ‘language as a barrier to learning’ needs to be expanded within the materials. One of the assessor argues that the module provides useful material on the teaching of reading and ‘*developing higher order skills of*

prediction, interpretation and questioning at different levels". It also has some good examples of how to address expressive written language challenges. However, it is argued that while these sections are important, more attention could be given to oral or spoken language development and the link between cognition, language and reading. It is suggested that this would expand the knowledge of the teachers about how to address language and reading barriers and the learning and teaching theories behind such strategies.

- OBE is not overtly integrated in the content of this material.

10.7.4 Teaching strategies

In general, this Module reflects or models the OBE approach. In particular, it is facilitative, interactive, and participatory in its approach (although there are one or two examples of a rather 'authoritarian' tone). A reflective, action-research approach is clearly evident in this material.

The major weaknesses highlighted in this area of assessment were that the mediated and cooperative learning approaches are not overtly dealt with, and that the allocation of time for some of the activities appears unrealistic.

10.7.5 Assessment procedures

Comments from the materials assessors on this aspect of the programme and materials highlighted the need for clearer guidelines for assessment of the educators' competences; the need to weight the assessment tasks (which relates to accreditation requirements); an inclusion of 'reflection' activities in the assessment tasks; and an overt commitment to flexibility in the way educators are assessed (to reflect this challenge in any 'inclusive' curriculum).

10.8 Feedback from Teachers

10.8.1 Was the training programme useful for the teachers?

Table 3.11

Answer type	No of teachers	% of total responses (to question)
Yes	181	92.3%
Not sure	9	4.6%
No	1	0.5%
No answer	5	2.6%

The findings show that there was a very positive response to the training programme provided for teachers in this project. 92% of the teachers said that it had been useful.

10.8.2 What parts of the training programme were most useful?

When identifying those aspects of the training that were most useful, the following key areas are clear:

- Teachers became aware of the policy on inclusive education and their attitudes towards 'diversity' were changed positively
- They have become aware of and have learnt to deal with barriers to learning
- They feel more able to address challenges relating to HIV/AIDS
- They feel more able to address challenges relating to drug and physical abuse
- They have learnt strategies for dealing with discipline problems
- The materials provided with the programme have been useful

10.8.3 Which parts were not useful or least useful?

A few aspects of the programme were not useful for the teachers. This included insufficient training; some of the materials; and learning how to deal with discipline problems.

10.8.4 Were the learning materials helpful?

Table 3.12

Answer type	No of teachers	% of total responses (to question)
Yes	169	86.2%
Not sure	15	7.7%
No	6	3.1%
No answer	6	3.1%

The response to the materials provided in the training programmes was also very high (86% responding positively).

10.8.5 In what ways has this material been helpful?

Ways in which the material was found to be useful by the teachers included the fact that it has provided them with a very useful reference point; group or collaborative activities have been promoted; and it has helped to convince them that all learners should be treated equally.

10.8.6 Why have the materials not been helpful?

The two main issues highlighted in this section relate to (a) the view that the material came as a 'blue-print'; and (b) that the teachers were "told what to do", or had to answer a question "whether you understood it or not". This latter comment is perhaps

in line with the one materials assessor's concern that there were places in the material where an authoritarian tone was evident.

10.9 Summary and Comment

From the views of the teachers and the materials assessors, the educator development programmes and materials have been very successfully developed in this pilot project. Areas of improvement that have been highlighted reflect the need for refinement of what is considered to be an excellent base. This refinement includes making the materials more accessible through various techniques geared towards developing an 'easy read' translation – and there are examples of how this has already been done in these materials (particularly the last unit of the module). It has also been suggested that some of the theoretical aspects of the programme be examined – particularly in terms of the learning theories that have and have not been included.

11. CAPACITY BUILDING OF SUPPORT PROVIDERS AND MANAGERS

11.1 Has the project provided adequate capacity building to the Project Management Team and Project Support Team to enhance their capacity to provide support to the schools concerned?

The PMT provided very mixed responses to this question. Although 5 (out of 9) responded positively to this, the other 4 either said 'no' or were unsure. The two PST members also responded differently with one saying 'yes' and one saying 'no'. This suggests that there have been different experiences in these teams that may or may not be generalisable to other members.

11.2 What training/capacity building is still needed for district officials and members of the support team to be able to provide adequate support to the schools?

In response to this question members of the PMT said that there was a need for capacity building at provincial level. This should include guidelines on how to manage inclusive education on a 'macro-level'. One specific comment related to the need for adaptation to the curriculum to occur so that those learners who need these adaptations can be accommodated. Lastly, one PMT member said that *"from project, regional and provincial level, there needs to be an understanding that terminology does not change overnight"*, indicating that we need to create realistic time-frames for this transformation process. The only area identified by a PST member relates to the need for skills training to respond to the learning needs of 'learners with severe disabilities'.

11.3 Assessment of Capacity Building Materials

One of the material assessors from the national evaluation research team evaluated all the training programmes and materials for workshops held with the school management and governance structures. While some of her focus was on broad 'curriculum' issues (the what and how of what was covered), the main emphasis in this assessment was on the relevance of the programmes and materials in relation to the White Paper 6 on inclusive education, and in relation to local needs. She also focused on the accessibility of the material for the target participants identified. The findings outlined below are a summary of her views on these issues.

11.3.1 Congruence with White Paper 6

The capacity building programmes and materials developed in this project were congruent with the national policy framework. In particular, they provide very relevant and useful information on inclusive education, providing a clear overview of principles and a conceptual understanding of barriers to learning. They also do attempt to shift attitudes towards a more systemic paradigm.

The terminology used in the materials is generally aligned with White Paper 6, but there are instances when this could be improved (refer full report).

11.3.2 Relevance

The practical way in which the barriers to learning are dealt with in these materials makes them very relevant. The barriers and needs that are focused on do seem to be relevant to those schools and geographical location.

11.3.3 Accessibility

The practical nature of the material, its relevance to local needs, and the use of practical teaching strategies such as drama, makes this material accessible. The simplicity of the presentation as well as good use of visuals, also helps in this regard. There are successful attempts to present this material in accessible language. The examples provided help with this.

Weaknesses that were noted, however, relate to the flow of language which is not always easy to follow, and some confusing statements about the barriers to learning (refer full report). The assessor also makes other suggestions for how to improve the presentation of the material so that it is more accessible, particularly to parents on the SGBs.

11.3.4 Other curriculum issues

The content of the material is comprehensive and informative. There does, however, seem to be a bias towards physical barriers and not enough attention given to the psychosocial issues that result in the exclusion of so many learners in this area.

The teaching strategies that appear to be used in this programme are creative and practical. In particular, the assessor noted that the use of drama, demonstrations and

questioning are particularly successful. A very useful step-by-step guide on how to develop inclusive school policies is provided. In general, the training strategy used guides the participants through different levels of understanding of inclusive education and the different barriers to learning.

Lastly, the materials assessor was concerned that the learners had not been targeted in the capacity development programme, particularly given their potentially important role in providing peer-support and education within the classrooms. She also suggests that these programmes and materials be further developed to accommodate members of the community who can and do play a central role in supporting schools to implement inclusive education.

11.4 Summary and Comment

While there does seem to be a need for much more capacity building at the district level, some success has been achieved in this regard. What is rightfully pointed out by one participant in the focus group interview is that this process will take time because it demands a major 'paradigm shift' in the minds, hearts and practices of all concerned. So, capacity building at this level does remain an important priority for this district.

With regard to the capacity building programmes and materials, this pilot project has achieved an enormous amount in a small amount of time! Building on the strengths of what has been achieved thus far, it is suggested that these programmes and materials be further developed to address the ongoing capacity building needs of the various role players, including parents and learners (who can play an important role in supporting and teaching one another in the classroom and school context).

12. CONCLUSION

Given the time and financial constraints linked to this project, those involved have done an excellent job in beginning to implement inclusive education in this district, and even beyond (through various 'ripple effects'). The hard work of the consortium members and the project co-ordinator has played a central role in 'making this work'. The commitment of all the role players has also been a key factor in this regard. They should all be congratulated on this excellent work that can only make a positive contribution to the implementation of inclusive education in this country, and beyond.

The findings from this evaluation show that the teachers view this project in very positive terms, and have been helped to integrate the principles and challenges of inclusive education in their classroom practices. They have clearly made the link between inclusive education and OBE, which has made implementation much easier. The 'training and support', and 'school-based' training model, developed so successfully in this province, have helped to make this happen. Most of the principals are also very positive and, although there are exceptions and room for further work, they seem to have played a very important role in helping to implement inclusive education in their schools. ISTs have been established in the pilot schools and many of them seem to be operating in the way expected from the policy framework. The positive 'spin-off' effects of this for broader school development are important to note here. There also seems to have been some important successes in terms of getting

SGBs to integrate the principles of inclusive education in their school policies and management and governance practices.

The educator development programmes and materials have been very positively assessed in this evaluation. While there are areas needing 'improvement' – primarily to ensure that all relevant role players can engage successfully with the texts produced – a basis for this further development has been excellently laid.

At district level, it is clear that the different role players have learnt a lot about how to work together in order to support the implementation of inclusive education in the pilot schools. In particular, it seems that the different support providers in the various education directorates have started to develop a common language and purpose, and are trying to work together to address various challenges. Although there is clearly still a lot of work to be done here, the education officials – at district, regional and provincial level – have seen the need for more integrated planning and programmes.

The development of the special school/resource centre in this district appears to have been positively pursued in recent months. Their active participation at district level is evidence of this. They also do seem to have had positive experiences in the process of discovering what they need to do and be as a 'resource centre' in the area. Although, as with all the other special schools/resource centres in the three pilot districts, they feel that they need more support, including resource support, in order to adequately fulfill their role.

One of the developments in this project that deserves highlighting is the way in which school-community relationships have positively developed – through the inclusive education initiatives that have been successfully integrated with the health promoting schools strategy.

It seems that the key challenges facing this district are (a) the need to find ways to 'sustain' the process, so that the gains are not lost, and so that others can learn from these experiences; (b) further capacity building at district and other levels, so that support roles, functions and responsibilities are clarified for all concerned, and that a practical collaborative framework is developed; (c) the need for integration of the implementation of inclusive education into central strategic planning and programmes in the department; (d) further building of collaborative working relationships with the various role players who need to be involved in addressing the many psychosocial challenges facing these schools - this includes other government departments and various community people, groups and organisations; and (e) the ongoing, massive challenge of addressing the 'basic' needs of schools that are struggling to build a culture of teaching and learning, particularly in the face of many psychosocial barriers to learning.

CHAPTER FOUR

NORTH WEST PROJECT

1. INTRODUCTION

The research conducted as part of the second phase of the National Quality Evaluation in the Eastern Cape Province included the following methods of data collection:

- The development and administration of separate questionnaires to teachers in the pilot schools, the principals of pilot schools and members of the Project Management Team (PMT) and Project Support Team (PMT)
- Focus group interviews by the national quality evaluators with members of the PMT and PST
- Focused assessment of the educator development and capacity building materials by three assessors.

The questionnaires and interview schedules used are attached at the end of the report as Appendix B and C respectively. The separate reports by the materials assessors for this province will be sent directly to the province for their attention.

In this province the action research team leader and project coordinator took the questionnaires to the schools where they explained to principals what was required and clarified any uncertainties. The principals then organised for the teachers to complete their questionnaires, which were collected from them by the provincial project co-ordinator two weeks later. The project co-ordinator also ensured that questionnaires completed by members of the PMT and PST in this province were submitted to the national quality evaluators.

The findings of the research process undertaken in this province and presented in this chapter are drawn from the following sources of primary data:

- Returned questionnaires from 10 principals
- Returned questionnaires from 109 teachers
- Returned questionnaires from 4 members of the PST/PMT
- Interview notes from focus group interview with 8 members of the PST
- Interview notes from focus group interview with 8 members of the PMT¹
- 3 reports from materials assessors

As indicated in Chapter One the findings of the research are presented under headings that relate to the original aims and objectives of this final phase of the national quality evaluation.

¹ It should be noted that there is some overlap between members of the PMT and PST

2. BENEFITS OF THE PROJECT

2.1 Introduction

All role players were asked to indicate in the questionnaires whether they felt that the project had been of benefit to the pilot schools involved. They were also asked to clarify their answer by saying what they felt the specific benefits have been. If they felt that the schools had not benefited they were also asked to explain their reasons for saying this. If the respondents said 'yes' to this question (that is, the school had benefited from the project), they were asked to clarify how much they felt the school had benefited.

2.2 Have the pilot schools benefited from their involvement in the project?

Table 4.1

Answer type	Teachers	Principals*	PMT & PST*
Yes, definitely	73 (67.0%)	9	3
Yes, but not very much	26 (23.9)%	1	1
Not sure	4 (3.7%)	0	0
No	0	0	0
No answer	6 (5.5%)	0	0

* Percentages are not included due to the small number of respondents

The table above shows that approximately two thirds of the teachers felt that the schools had definitely benefited from being involved in the project. As will be discussed below, the teachers' responses include their views about how they had benefited personally from being involved in the project as well the perceived benefits to the learners and school as a whole. Nearly a quarter of the teachers indicated that although the schools had benefited, they did not feel that the benefits had been extensive. That is, the school had not benefited very much from the project. Of the ten principals who filled in the questionnaire, nine said that they felt their school had definitely benefited from being involved in the project, with only one principal having some reservations about the benefits of the project for the school. The majority of PST/PMT members also responded very positively to this question.

2.3 How have the schools benefited?

A large percentage of the teachers emphasised how important the project had been in changing their attitudes towards or deepening their understanding of, the different learning needs of learners in their classrooms. This included recognising and

respecting differences between learners as well as respecting each learner's capabilities and capacity to learn. One teacher explained this in the following way: *"the project made us enjoy teaching learners whom we thought were only for special schools"*. Many of the teachers emphasised that not only had their attitudes changed, but they had also learned new skills, particularly about how to address the barriers that the learners in their classroom were experiencing. The particular skills that they learnt through the project are presented in Section Seven in this chapter. Other teachers noted that they felt more confident now to deal with the learners in their classrooms. One teacher said: *"As a grade 1 educator I used to go home stressed by learners who are slow, but not I enjoy working with them"*. Some teachers also noted that the project has helped them to see the importance of working collaboratively with each other as well as working more closely with parents and other community support systems.

The views put forward by the teachers were largely emphasised by the principals as well as by the members of the PST and PMT. The latter also felt that a key benefit of the project had been the improved understanding gained by all role players of White Paper 6 and associated with this, more support for inclusive education.

2.4 Why have the schools not benefited?

The generally positive feeling of teachers and principals to the project is also reflected in the fact that, as Table 4.1 above shows, none of them indicated that the schools had not benefited in any way from the project. Only the members of the PST and PMT emphasised that implementing the policy would take time and that schools would require ongoing support from the department officials. They felt that time constraints had undermined the benefits of the project and that officials had not always been able to provide the level of support that was needed.

2.5 Summary and Comment

The responses from all role players indicate very positive perceptions about the value of the project for the pilot schools involved. Of particular importance has been its impact on the teachers, with the majority indicating its importance for them as practitioners in the classroom. Where concerns about its benefits were raised, these point to challenges around the implementation of the new policy rather than specific weaknesses in the project itself.

3. WHAT WORKS?

3.1 Introduction

In the questionnaires teachers, principals and members of the PST and PMT were asked to comment on what parts of the project had worked the best. This question was also asked of the PMT and PST members in the focus group interviews. Getting people to reflect on what had worked in the project and why, was seen as a very important aspect of the evaluation process. It was hoped that through their involvement in the project role players would identify 'best practices' in implementing the inclusive education policy. Learning lessons from the project to share with the

rest of the country and members of the Southern African Development Community (SADC) has been a central aim of the project.

The findings of the evaluation around what can be learnt from the pilot projects in all three provinces is presented in more detail in Chapter Six of this report. It should also be noted that, shortly after finalising this report, a 'booklet' on 'Learning from Practice' will be compiled and distributed through the Department of Education to all provinces and SADC countries, thereby sharing the 'good practices' that have emerged during this project.

In general the different role players drew from their own experience in commenting on what had worked. So the responses from the teachers and principals are mainly about what worked for them in the project while the members of the PST and PMT provided a more holistic view of the project as a whole with its different components.

3.2 What worked?

Those aspects of the project that worked the best for the teachers in the pilot schools are very similar to the benefits captured in the previous section of this chapter. That is, the effect that the project has had on changing attitudes about learners in the classroom and through equipping teachers with new skills to address barriers to learning. It is important to note that the area identified by the most teachers as a very important 'learning' from the project was the area of assessment. This suggests that many teachers felt that learning about how to identify and address barriers to learning and to assess learners who were experiencing barriers to learning was very important for them.

Below is a synthesis of the key issues identified by all the role players, that is, the teachers, principals and members of the PST and PMT.

Awareness of the Policy on Inclusive Education:

- All role players emphasised that the project had enabled them to learn about White Paper 6 and inclusive education. Particularly important were improved understanding about barriers to learning and developing an awareness about overcoming the discrimination and exclusion experienced by some learners in the past, especially learners with disabilities and adult disabled learners.
- The project also enabled the role players to more clearly make the link between barriers to learning and contextual factors such as poverty and HIV/AIDS.

In the School:

- All the role players identified the training programmes or workshops as very important and positive aspects of the project. Issues raised in relation to the effect of the training include attitudinal change, new and improved levels of skill among teachers, information about the new policy, and the value of strategies such as collaborative working and 'getting help'. The role players, especially the members of the PST and PMT felt that involving all teachers in the pilot schools in the training activities was a very important strategy.
- The provision of bursaries for teachers to learn more about what was initiated through the project was a very important incentive.

- The setting up and training of the Institutional-Level Support Teams (ISTs) was seen as very important.
- The critical role of parents and the importance of strategies to involve parents more in their childrens' learning was reinforced through the project, and "*collaboration with parents intensified*".
- Refurbishment of schools and making them more accessible was seen as a very positive outcome of the project
- The PMT and PST members emphasised how important the principal was in the effective implementation of inclusive education in the schools. Where the principals had been supportive, he/she had acted as a 'champion' which had a very positive effect on the teachers, the parents and other role players.
- All role players identified as very positive the role that the consortium had played in the project. This included the members involved in the training as well as the researchers and the ongoing support that they were able to offer to the teachers and schools.

At District Level:

- The effective functioning of the PMT within the project was seen as an important basis for developing the District Support Team (DST). Of particular importance was the opportunity that the structure created for people with different skills and expertise to work together and "*learn from each other*".

Community Partnerships:

- The closer involvement of the community in the school through the project was seen as very beneficial, especially the "*drawing in of natural leaders from the community*".

3.3 Summary and Comment

Overall the role players identified 'good practices' or effective strategies in most areas of the project. These included the value of particular structures such as the ISTs, the PMT, and the consortium in the project; the importance of leadership such as the role of the principal; as well as strategies that create greater involvement from parents and the community in the school. Of particular importance is the extent to which the activities of the project, especially the training and advocacy work, have created opportunities to bring about changes in attitudes that can be translated into new and more equitable practices in the classrooms and schools. This attitudinal change is very important for the ongoing implementation of the inclusive education policy.

4. DIFFICULTIES AND CHALLENGES

4.1 Introduction

One of the main questions often asked by people and countries who want to know how to implement inclusive education is "what was difficult and how did you overcome those difficulties?". This section of the evaluation deliberately focuses on the difficulties that the various role players experienced when trying to implement

inclusive education in their pilot district. This information can be very useful when planning for further implementation in this district and in the rest of the province.

This information, obtained from the questionnaires and interviews, is synthesised across role players as they tended to highlight the same issues.

4.2 Key difficulties experienced through the project in the implementation of inclusive education

The challenges identified by the role players can be summarised as follows:

Teacher Training:

- A number of the teachers identified specific modules of the training programme that they felt had not worked well in the project. It is important to note that some of the areas identified are the same areas noted by other teachers as aspects of the project that had worked well. For example, assessment. It would seem, therefore, that teachers evaluated the training provided in relation to their own experience and what was valuable or not valuable to them as practitioners.
- A number of the teachers felt that the project, and especially the training workshops, had taken up time outside of school hours (such as Saturdays) and increased the large administrative load already on their shoulders. This point was also emphasised by some of the principals.
- Although most teachers seem to have learnt a lot from the project, some of the teachers identified areas where they still felt unconfident. In general, there remains a fear among a number of the teachers about their ability to cope with learners with 'difficult' or severe disabilities. One teacher commented, "*If you need to pay attention to a brain damaged person who cannot respond, you cannot teach*". Another said, "*we needed to experience learners with difficult disabilities*".
- The PST/PMT members commented that although all the teachers from the pilot schools had been involved in the project and could now "*say the jargon*", the challenge really lay in putting what they had learnt into practice. They said that the ability to do this was complicated by the '*under training of teachers generally*'.

Support Provision:

- One of the central challenges arising from the project is the need to sustain the support that teachers have received in implementing inclusive education. This includes the learning material needed to help teachers to implement inclusive practices and ongoing 'follow-up' with schools – '*to check whether educators are doing what they are supposed to do*'
- Some of the principals and teachers say that the IST has not yet been established or is not functioning as well as it could be
- There is not enough support for schools from education officials at the district office. However, it was also noted that education officials face problems such as transport in supporting the schools

Socio-Economic/Contextual Issues:

- All role players identified existing conditions in the schools as a major challenge for inclusive education. The issues identified include lack of physical resources in the school as well as ‘overcrowding’ in the classrooms. The impoverished conditions under which many of the learners live contributes to a range of psychosocial barriers identified by the role players.
- Some of the principals noted that the refurbishment process at the schools has not yet been properly completed.

Policy Implementation:

- All role players pointed to the complexity of the policy implementation process. For some of the teachers this included the challenge of putting the philosophy of inclusive education into practice, especially in the classroom. The challenge of implementing inclusive education is also linked by all role players to the contextual/socio-economic factors noted above.
- Some role players said that the foundation phase or the early childhood development level (ECD) level had not been given sufficient attention in the project.
- Members of the PST and PMT felt that to date the National Education Department had not provided the provinces and district offices with clear guidelines to assist in the policy implementation process.

Leadership and Management:

- Members of the PST and PMT pointed to a number of challenges in relation to the attitudes, understanding, and commitment to inclusive education of education officials at the district and provincial level. It is felt that these challenges have had a very negative impact on the project and are detrimental to the ongoing implementation of White Paper 6.
- They pointed to the fact that inclusive education is still seen as something separate, the responsibility of the ‘auxiliary’ personnel only, and not sufficiently prioritised. It is also still seen as a project rather than a policy that is being implemented.
- One member described the attitude among most education officials outside of ‘auxiliary services’ in the following way. It is seen as “*a little bit of a joke no matter what we have done*” and asserted the fact that “*other work must take priority*”. This attitude has meant that within the PST, in particular, “*other departments have lost respect for the education department*” and this has undermined their commitment to supporting the implementation of inclusive education.
- The lack of integration between inclusive education and outcomes-based education (OBE) in relation to planning and implementation at the district level is seen as a challenge and has been a problem throughout the project

4.3 Summary and Comment

While some of the challenges noted by the role players relate directly to the activities of the project (for example, when workshops were held), many relate directly to the implementation of inclusive education in disadvantaged schools which are faced with many constraints. These extend from the kind of barriers which learners experience

to problems such as class size. There is a strong sense among all the role players that these conditions make the implementation of inclusive education difficult. However, there are also challenges that point to the role which education officials play in the management and implementation of the policy. These challenges range from the level of support provided to schools to how the inclusive education policy is addressed within the delivery of education services. There is a general sense that not enough leadership is being provided at a national, provincial and district level to give direction to building inclusive education.

5. ROLE OF PROJECT IN POLICY IMPLEMENTATION

5.1 Introduction

As a pilot, a central aim of this project has been to support the process of implementing the government's new policy on inclusive education (that is, White Paper 6). This section of the evaluation focused on drawing out lessons that can be learnt from this pilot project for general education policy implementation. In this project, a combination of strategies was used to implement White Paper 6 on inclusive education. This included a 'top-down' approach reflected by the introduction of new education policy, as well as a 'bottom-up' approach that focused on action research in the pilot schools and classrooms. The questions raised in the research were aimed at finding out what the different role players' experiences were in relation to the success of these strategies. Did they actually help them to implement the policy on inclusive education? The questions emphasised whether the teachers in particular had found the project useful in this regard.

5.2 Did this project help teachers to understand and implement the inclusive education policy?

Table 4.2

Answer type	Teachers	Principals*	PMT & PST*
Yes	87 (79.8%)	9	3
Not sure	18 (16.5%)	1	1
No	0	0	0
No answer	4 (3.7%)	0	0

- Percentages are not included due to the small number of respondents

Table 4.2 above shows clearly that the majority of role players felt that the project had been valuable in helping them to implement the inclusive education policy. Although none of the respondents said that the project had not helped in the policy implementation process, a minority of teachers, principals and members of the PMT and PST were unsure about whether the project had been beneficial.

5.3 How has the project helped teachers to understand and implement the policy?

The reasons given by the teachers, principals and members of the PST & PMT are generally similar to the points already noted as the perceived benefits of the project. That is, the project is seen to have been of benefit to the role players, especially the teachers, as it has helped them to understand and implement the policy on inclusive education.

The responses given by all the role players were similar and emphasise the positive effect that the project has had on helping teachers to understand that learners have different learning needs. Specifically mentioned are learning needs arising from language, ethnicity, disability and HIV status. The project has also contributed to increased awareness about the rights of all learners to education, especially learners with disabilities. In this sense the project seems to have assisted in changing attitudes and addressing fears about issues that teachers knew little about or were unconfident about in the past. This has included helping teachers to understand 'terminology' used in the policy document and more broadly around inclusive education. Some of the principals stated that this increased awareness and understanding among teachers had increased their motivation towards inclusive education.

At a more practical level role players also emphasised that the project had assisted in translating the policy goals of White Paper 6 into practical steps for teachers. Most importantly are different teaching and learning methods as well as the ability to address barriers to learning.

Role players also felt that the project had assisted teachers by providing them with ongoing support around the implementation of the policy. This included the action research process and the way in which it was used to support and monitor teacher's progress in the classroom.

5.4 Why did the project not help teachers to understand and implement the policy?

No comments were made by any of the role players to this question and, as already indicated in Table 4.2 above, no one said that the project had not helped teachers to understand and implement the policy.

5.5 Suggestions for how teachers can be helped to understand and implement this policy

All the role players pointed to the need for the positive benefits of the project to be strengthened. In particular, providing ongoing and sustained support to the teachers and more awareness raising to address continued negative attitudes. Teachers emphasised the need for more ongoing training. One teacher said; "*Teachers need to be trained for a longer period*". Another said; "*The Department of Education can give us a lot more courses like this on a regular basis*".

5.6 Summary and Comment

Both the teachers and the principals said clearly that they felt that the project had assisted teachers to understand and implement the national policy framework on inclusive education. Reasons given as to how the project had helped are similar to those mentioned by the role players as the benefits of the project for the pilot schools. This suggests that piloting of policy through a project of this nature is an extremely effective mechanism in the policy implementation process.

It would seem that the project has been especially important in the role that it has played in creating opportunities to support teachers through the change process. The reasons given by teachers as to why the project has been helpful with regard to the policy shows that it has deepened their knowledge about the policy and its goals. Teachers in this district emphasised their increased awareness and understanding about the impact of barriers on learning. They is also evidence of more support for some of the key principles of White Paper 6, such as the right of all learners to education provision.

The project has also enabled them to translate the policy goals into practical knowledge and skills that can be used in their classrooms. Of equal importance is the effect that the project has had on helping teachers to face their fears about the implications of inclusive education and on building up positive attitudes towards the new policy.

6. OBE-INCLUSIVE EDUCATION INTEGRATION

6.1 Introduction

This section of the evaluation focused on the extent to which teachers had made the link between inclusive education and the OBE curriculum. This is considered to be a key determinant of successful implementation of inclusive education in South Africa, particularly insofar as the curriculum challenges are concerned.

The findings from the research are presented in three main sections: teachers' views, the views of the members of the PMT (from an 'integrated' management perspective) and then the opinions of the three materials assessors who examined the materials with this question in mind.

6.2 Teachers' Views

6.2.1 Has learning about inclusive education and overcoming barriers to learning helped teachers to ensure that all learners are included in and benefit from the OBE curriculum?

Table 4.3

Answer type	No of teachers	% of total responses (to question)
Yes	95	87.2%
Not sure	7	6.4%
No	1	0.9%
No answer	6	5.5%

87% of the teachers said that learning about inclusive education had helped them to ensure that all learners are included in and benefit from the OBE curriculum. This shows a very positive response to the contribution the project has made, and especially the training processes, to helping teachers understand the link between inclusive education and OBE. Specific skills learnt which link to the OBE curriculum are also included in Section Seven in this chapter where teachers listed the skills they had learnt that helped them to practically implement inclusive education in the classroom.

6.2.2 Examples of how learning about inclusive education has helped teachers to teach the new OBE curriculum

When teachers were asked to give examples of how learning about inclusive education had helped them in relation to OBE, a list of forty examples were given. Below is a summarised list of those aspects most frequently mentioned by the teachers.

- Teachers emphasised the value the project had in helping them to include all learners in lessons and how issues such as teaching styles and pace can be used to facilitate the involvement of all learners
- A positive learning for many teachers was the value of group learning and peer support in helping all learners to learn
- Assessment techniques learnt through the project, including setting specific goals for individual learners were seen as important for OBE
- The importance of developing the learner's self-esteem and his/her 'right to develop to their full potential' was emphasised
- Some teachers felt that what they had learnt about language barriers and this had helped them to address 'language problems' in the classroom

6.2.3 What would help teachers to make sure that all learners are included in and benefit from the new OBE curriculum?

The only issue identified by teachers as important in helping them to strengthen the benefits of the OBE curriculum for all learners was the provision of more resources: both physical and human resources.

6.3 Views of the Project Management Team

6.3.1 Has the project assisted the Department to integrate inclusive education into its central strategic and management processes, including linking it with OBE?

Of the three members of the PMT who filled in the questionnaire, two members said that the project had assisted the Department to integrate inclusive education into its central strategic and management processes. The other member felt unsure about the impact of the project in this regard. No specific reasons were given as to why the project had not managed to assist the department in this way, or what challenges within the department affected the integration of inclusive education into central planning and management. Earlier comments from PMT/PST members about the challenges of implementing inclusive education, suggest that the lack of integration of inclusive education into overall strategic planning within the education department is regarded as a major obstacle to the policy implementation process.

6.4 Materials Assessment

The assessment of the educator development materials for this province indicates that throughout the material, the link between the OBE curriculum framework and inclusive education is made. Specific mention is made to Module 1 where the material on language and literacy is *“well located within an OBE framework and the methods and approaches used make relevant links to inclusive education”*. Specific mention is made of the three educator guides that include OBE outcomes and assessment criteria. However, it should be noted that while this important link is made, one assessor felt that the *“OBE jargon in the outcomes is often abstract and complex”*. This is a key weakness emphasised in broader reviews of OBE.

6.5 Summary and Comment

From the teachers' perspectives the project has been very helpful in deepening their knowledge and understanding of the OBE curriculum. In particular, it has helped them to ensure that the curriculum is accessible to all learners in their classroom. Much of their increased awareness and knowledge appears to have come from the training programmes and the learning materials. This indicates that the educator development materials produced in this province have managed well to make this important link. Improved knowledge around the OBE curriculum includes learning about new teaching methods and approaches that the teachers feel has helped them to include more learners. Learning about different assessment methods also appears to have been very helpful for teachers.

While there appear to have been important gains for the teachers in this area, it seems that making the link between OBE and inclusive education still appears to be an important weakness at the management level. As already pointed to under Section Four in this chapter, the strategic integration of OBE and inclusive education in the planning and delivery of education services in the district is still not taking place effectively.

7. PRACTICAL IMPLEMENTATION OF INCLUSIVE EDUCATION IN THE CLASSROOM

7.1 Introduction

In this section of the questionnaire, completed by teachers only, the aim was to find out whether teachers felt that they had been helped to implement inclusive education in the classroom. Teachers were asked to indicate in which areas of the curriculum (see Table 4.5 below) they felt this had been achieved, and then to add other areas if appropriate.

7.2 Has the project helped teachers to learn practical ways of overcoming barriers to learning in the classroom?

Table 4.4

Answer type	No of teachers	% of total responses (to question)
Yes	97	89.0%
Not sure	3	2.8%
No	3	2.8%
No answer	6	5.5%

Teachers responded very positively to this question, with 89% saying that they had been helped through the project to practically overcome barriers to learning in the classroom. As already indicated in Section Two and Three of this chapter, learning about how to address barriers is noted as a benefit of the project and something that works in building inclusive education.

7.3 In which aspects of the curriculum has this occurred?

Table 4.5

Areas where new skills have been learnt	No of teachers*
The content of what is taught	58 (59.8%)
Teaching and learning methods	75(77.3%)
Methods of assessment	78(80.4%)
The organisation and management of the classroom	69 (71.1%)
The organisation and management of the timetable	30 (30.9%)
Other areas	18 (18.6%)

* The percentage reflects the responses from the 97 teachers who indicated that they had learnt practical ways to overcome barriers to learning in the classroom (see table above). Most of the respondents indicated that they had learnt new skills in more than one area.

Table 4.5 shows that the aspects of the curriculum listed in the questionnaire are all areas in which teachers have learnt new skills. The areas that received the greatest response are teaching and learning methods, assessment methods as well as the organisation and management of the classroom. The area that received the least emphasis was in the organisation and management of the timetable.

Some teachers indicated that they had also learnt new skills in other areas. The following were noted as the most important 'other areas':

- The importance of understanding about the home background of the learner in order to address some of the barriers to learning or more broadly, knowing about "*their problems*"
- Skills to address barriers around language, literacy, communication and numeracy
- Overcoming barriers to learning through group work, peer support and "*mixing learners with different abilities and disabilities*"

7.4 What do teachers still need to learn to overcome barriers to learning in the classroom?

Some teachers still felt that assessment methods had not been given sufficient attention. However, as already indicated, many of the teachers identified assessment as a key 'learning' from the project.

7.5 Summary and Comment

The responses from the teachers to this section of the evaluation show that they have been helped to practically begin to identify and address barriers to learning in their classroom. There also appears to be an awareness of how all aspects of the curriculum can be changed to address barriers and ensure more active learning from all learners in the classroom. The area that received the most support from teachers was methods of assessment. This suggests that teachers found the new skills learnt in this area to be especially valuable.

The area that received the least support was around the organisation and management of the timetable. This is not surprising as this is an issue that affects the organisation and management of the school as a whole and teachers may feel that it is out of their immediate area of responsibility. Although this may explain the teachers' responses, it is important to recognise that flexibility in the way in which the time-table is structured and functions is a very important part of developing an inclusive school.

8. SCHOOL AND DISTRICT MANAGEMENT AND GOVERNANCE

8.1 Introduction

This section of the evaluation focused on various aspects of school and district management and governance. Principals and the members of the PMTs and PSTs were asked to respond to questions that were aimed at exploring whether existing school management and governance structures understood the implications of the new policy on inclusive education for their schools; whether any specific structures and procedures had been established in the schools and district to support inclusive education; and what needs to be put in place to facilitate the implementation of inclusive education.

8.2 School Management and Governance

8.2.1 Does the School Governing Body (SGB) understand the need and implications for implementing inclusive education in the school?

Table 4.6

Answer type	No of principals	% of total responses (to question)
Yes, they do understand/are aware	6	60.0%
It is difficult to say/not sure	3	30.0%
No they do not understand/are not aware	1	10.0%
No answer	0	0%

Six (60%) of the ten principals who filled in the questionnaire indicated that their SGB was aware of the new policy on inclusive education and understood its implications for the school. However, it is important to note that four of the principals either were unsure about the SGB's level of awareness and understanding (3) or said that the SGB was not sufficiently aware and did not understand the implications of the policy (1).

8.2.2 Have any structures and procedures been established in the school to implement inclusive education practices?

Table 4.7

Answer type	No of principals	% of total responses (to question)
Yes	8	80.0%
Not sure	0	0%
No	2	20.0%
No answer	0	0%

Eight of the principals (80%) said that structures and/or procedures had been set up to take forward the process of implementing inclusive education in their schools. Two principals, however, indicated that no such structures or procedures had been put in place. This does indicate that some schools have not yet addressed this challenge.

8.2.3 What structures and procedures have been established?

When asked what procedures or structures had been set up, the following responses were received:

- Regular visits by a remedial teacher to all classes to assist the teacher are taking place
- The SGB is involved in collecting more information in the village about barriers experienced by the learners
- Adjustments have been made to admission criteria in the school to “*give preference to learners with barriers*”
- Evening meetings with parents have been set up
- Meetings between the IST, teachers and the SGB have been organised
- Ramps for wheelchair users are being built
- The SGB has been made aware of out of school learners, with cases being followed up by parents, members of the IST and the resource center
- Informal guidance team has been set up to which children can come with problems

8.3 District Management and Support

8.3.1 What has been put in place in terms of management structures and procedures to sustain the implementation of inclusive education in the district and province?

In their responses to the above interview question, the PST and PMT in this province said that the following structures and procedures had been put in place to support the implementation of inclusive education in the district and province;

- ISTs have been established in the schools
- Teacher training material has been developed and will be used for ongoing training
- There is commitment and procedures at the district office to ensure ongoing support to the schools. However, such support is still only integrated into the job descriptions of support services/auxiliary services personnel – *“it should be integrated into the responsibilities of other education officials, especially the subject advisors”*

8.3.2 What needs to be put in place to sustain the implementation of inclusive education at these levels?

The following were identified by members of the PMT & PST as important for sustaining the implementation process:

- Although the DST is not yet up and running, this is recognised as a priority for sustainability and needs to be *“up and running soon”*.
- A dedicated post should be created at the district level for an ‘inclusive education co-ordinator’ who can act as a ‘champion’ to take the process forward.
- At the provincial level structures to support inclusive education need to be set up. Of particular importance is a provincial co-ordinator of inclusive education with a directorate for inclusive education. One of their tasks should be to ensure that in the departmental restructuring process inclusive education issues are integrated. The restructured department should support an integrated approach to implementing inclusive education within the province. This office should also be able to provide clear guidelines to the districts around the implementation process.
- Strategic planning should take place across divisions in the education departments and include the integration of inclusive education issues within all areas of responsibility. There should be a central ‘plan of action’ into which issues around inclusive education are integrated.
- The expertise developed through the project should continue to be utilised.
- The universities and non-governmental organisations (NGOs) who have been involved in the project should continue to play a central role in working with the department to support the implementation of White Paper 6 and inclusive education.

8.4 Summary and Comment

In this section of the evaluation the emphasis was placed on exploring the understanding of all role players of what is and what needs to be in place to successfully implement the new policy.

From the school level there appears to be some awareness among members of the SGBs about the implications of the policy for the school. However, it would seem that this area requires more attention if the policy is to be effectively managed and supported at this level. As Chapter Seven of this report shows, awareness and support from the SGB is regarded as a key 'indicator' for the development of inclusive education.

This section of the evaluation also indicates that important challenges continue to exist at the district and provincial level. Three important challenges stand out. These are; the establishment of an effective and sustainable DST; the appointment or organisation of staff at the district and provincial level who are 'dedicated' to the development of inclusive education in the district and province; and an integrated approach to strategic planning at the district and provincial level that ensures the 'infusion' of inclusive education issues into all areas of strategic planning.

There is also a feeling from the role players in the district that the continued involvement of higher education institutions and NGOs in building capacity around inclusive education in the district is very important.

9. SUPPORT NEEDS AND PROVISION

9.1 Introduction

In this section the views of all role players on support needs and provision are summarised. Specific attention is given to the development of the ISTs in the schools: whether they have been established and how well they are now functioning.

9.2 Teachers' Views

9.2.1 Do you know what kind of support you can get inside and outside of your school to help you to overcome barriers to learning?

Table 4.8

Answer type	No of teachers	% of total responses (to question)
Yes	92	84.4%
Not sure	0	0%
No	11	10.1%
No answer	6	5.5%

84% of the teachers said that they did know what kind of support was available to them both inside and outside the school. While this reflects the opinion of the majority of teachers at the pilot schools, 10% of the teachers said 'no' and 6% did not answer the question. This suggests that there are still some teachers who do not feel that they are sufficiently aware of what support is available to them. It should also be noted here that the single member of the PST responding to the same question felt that teachers were aware of how to access the support available to them.

9.2.2 Has the Institutional-Level Support Team (IST) been established in the school?

Table 4.9

Answer type	No of teachers	% of total responses (to question)
Yes	90	82.6%
Not sure	9	8.3%
No	6	5.5%
No answer	4	3.7%

Table 4.9 above shows that ISTs have been established in most of the schools. However, nine teachers indicated that they did not know if an IST had been established and six said that the structure had not been established (four teachers did not answer the question). This suggests that some teachers may be unaware of the establishment of the IST in their school or they may not yet have been established.

When the teachers who indicated 'no' in their questionnaire were asked if they knew why the IST had not been established, three indicated that they did not know the reason. One teacher said that in fact an IST had been established but that it was not functioning on a regular basis; it only operated "*when there is a need*".

9.2.3 Are you a member of the IST?

Table 4.10

Answer type	No of teachers
Yes	37
Not sure	0
No	53
No answer	19

In response to this question, 37 teachers said that they were members of the IST at their school. The overall response to this question (taking the 'no' and 'no answer' options into account) indicates that approximately one third of the teachers in the pilot schools are members of the ISTs. This finding is to be expected as, in any school, only a minority of the teachers would be members of the IST.

9.2.4 Is the IST supporting teachers to overcome barriers to learning?

The members of the IST were then asked to say whether they felt that the IST was supporting teachers to overcome barriers to learning. The following responses were received from the 37 IST members who responded:

- 36 indicated that they feel that the IST is helping teachers to overcome barriers to learning in their classrooms
- 5 indicated that they did not feel the IST was helping teachers to overcome barriers to learning
- 3 respondents were unsure.

These responses show a very positive response from the IST members about the role that the IST is playing in the school. However, since the total number of responses to the question (44) exceeds the number of team members (36) it is difficult to know if the 'no's and the 'unsure's are members of the IST or not.

The members of the IST indicated a number of ways in which they felt the IST was helping teachers in their schools:

- The IST enables the teachers to discuss particular barriers that learners in their classes are experiencing and provides an important structure for peer review to take place and to give guidance to the teachers
- The IST gives teachers different ideas about how to handle particular problems they are experiencing in their classrooms

- The IST assists the teachers with teaching materials and equipment and how to structure lessons to “*make inclusion work*”
- The IST provides a link between the teachers and personnel with specialised skills such as social workers and psychologists
- The IST links teachers with other support systems in the community
- The IST liaises with parents to help in addressing barriers to learning
- The IST helps teachers to monitor the progress of learners according to their different learning needs

Of the respondents who indicated that the IST was not supporting teachers, the following reasons were given:

- IST members and teachers are still unsure about how to receive and give support ... “*it is a slow process*”
- IST members and teachers are overworked
- Although teachers complain about some learners “*who do not achieve*” they do not make effective use of the support mechanisms in place
- IST members lack the time needed to support teachers properly

9.2.5 If you are not a member of the team, do you know how to get help from the IST?

Of the teachers who are not members of the IST (53)

- 46 said that they knew how to get help from the IST to support them
- 11 said that they were not sure of how to get help from the IST

While the responses from the non-IST members shows that the majority do know how to get help from the IST, once again the number of responses to this question exceeds the number of teachers who said that they were not members of the IST. Despite these discrepancies in the data, it would appear that most of the teachers in the pilot schools do know how to get support from the IST. This suggests that the ISTs are playing a valuable role within the schools.

9.3 Principals’ Views

9.3.1 Has an IST been established at the school?

As with the teachers, the vast majority of principals (9 out of 10) indicated that an IST has been established at their school.

9.3.2 Is the IST functioning well – supporting teachers to address barriers to learning?

Eight of the principals said that the IST was functioning well. However, one principal felt that the IST was not functioning well to support teachers.

Principals were also asked to give their opinion on how the IST was supporting teachers. They identified the following roles that the IST is playing in the school:

- Members of the IST attend meeting with teachers and then helps them to address barriers through distributing information or through directly helping them in the classroom
- The IST provides a forum for teachers to refer problems to
- The IST is helping teachers to set learning goals according to their capabilities for all the learners in their classrooms
- Members of the IST help teachers to identify learners who are experiencing barriers to learning
- The IST, the principal, the teacher, the site manager and the parent work together to solve problems which learners are experiencing

Two reasons given for why the IST was not functioning well were the fact that the IST had not yet met; and that teachers were not making effective use of the structure.

9.3.3 What support does your school need from the Department of Education officials to implement inclusive education?

Principals were asked to express their view on what kind of support their school needed from the Department of Education if they were to implement inclusive education effectively. The responses from the principals pointed to the need for provision of much needed resources, including learning materials, transport, audio visual aids and wheelchairs for learners who needed them. Some emphasised that resource needs extended to basic physical infrastructural needs such as toilets, sports grounds and ramps to make the school physically accessible.

Principals also indicated that in-service training was needed for teachers, and that there was an ongoing need for advice and support from the Department.

9.3.4 What support does your school need from parents?

When principals were asked to identify what support was needed from parents, the overwhelming response was around greater involvement of the parents in the school and more specifically, in the learning process of the child. Suggestions for such involvement included: helping to protect the school from vandalism and theft; bringing children with disabilities to school; and helping to identify barriers to learning. The principals also indicated that, in general, parents needed to be willing to discuss problems that their children may be experiencing and to accept their children. Parents also needed to recognise that the school may not be able to solve the most extreme problems.

9.3.5 What support does your school need from organisations and people in the community?

The principals indicated an overwhelming need for the community to assist in improving the physical resources and facilities of the school. Resource needs extended from the donation of clothes to sports facilities and safety devices. The principals also indicated that members of the community and people in NGOs have valuable skills that they could use to support the school (for example, giving financial advice and developing productive vegetable gardens. That is, they can act as

'resource people' for the school. Their role in the training of educators, particularly the NGOs, was also emphasised.

9.4 Role of the Special Schools/Resource Centres

No responses were received from principals in the special schools/resource centres involved in the project.

Although the data around this issue is therefore limited, it should be noted that in the interview with the PMT and PST conflicting views were expressed about the role of the special school/resource centre in the project. Members of the PST and PMT felt that the attitudes of the parents of children attending the special school in the project were very positive and that this had been valuable for the project. However, some members felt that the attitudes of many of the teachers were still very negative towards the project and inclusive education. It was suggested that this attitude arose more from a broad range of difficulties that the school continued to experience and was not necessarily directed towards the inclusive education policy and the project. Another special school/resource centre in the district that had become involved in the project was very positive about inclusive education but concerned about their future and their role as a resource centre.

The information that was obtained through the evaluation process about the role of the special school/resource centre in this project, suggests that supporting and strengthening the special schools in this district will be an important priority for the ongoing policy implementation process.

9.5 Views from the Project Management Team and Project Support Team

9.5.1 Structures and procedures that have been set up to support schools to implement inclusive education in their area

All the members of the PMT/PST (4) who responded to the questionnaire said that the education officials had set up structures and procedures to provide ongoing support to the schools in the implementation of White Paper 6. It was also felt that the project had assisted in promoting collaboration between education officials and members of other departments.

The following structures and procedures were mentioned:

- Ongoing follow-up meetings with teachers to discuss new information and address barriers to learning have been organised
- Individual support to learners, parents and teachers, including classroom-based assistance is provided
- ISTs have been set up in the schools
- There is commitment to set up a DST
- A collaborative working relationship has been established between the Departments of Health, Correctional Services and Social Services to support schools

The specific measures listed here should be read in conjunction with the other sustainability measures which members of the PMT and PST raised in the interview process. These are captured in Section 8.3 of this chapter.

9.6 Summary and Comment

A key aspect of the evaluation into support provision focused on whether ISTs had been set up in the schools and on how well they were functioning. The evidence collected from teachers and principals indicates that ISTs have been established in most of the pilot schools. Overall, there was a positive response from teachers and principals to the role that the IST is playing in their school. This includes awareness among teachers about the kind of support that is available both inside and outside the school. The roles that ISTs are playing in the schools appear to be extremely appropriate to what is expected from them within the national policy framework. In general, the ISTs are providing appropriate support to teachers by giving them advice, linking them to external support mechanisms and monitoring the development of inclusive practices within schools.

The few problems identified by teachers and principals relating to the functioning of the ISTs fall into two areas. Firstly, there are problems that are to be expected with any new structure that is still in its infancy. Secondly, problems exist around the time that teachers feel they have available to either participate in the IST or to seek help from its members.

The schools indicated very clearly that the support that they need from the Department to implement inclusive education is around the provision of much needed resources. This includes human resources (for advice and training) as well as basic physical infrastructural resources. Principals also expressed the wish that they would like parents and other members of the community to be more involved in the school.

Although the data collected through the evaluation process around the involvement of the special schools/resource centre in the project is limited, what was available points to the need for this area to be given more attention in the district. Special schools/resource centres in the district need to be supported and assisted to develop their capacity to play the role expected of them in the national policy framework.

Despite a number of important constraints already highlighted around the management of inclusive education at the district and provincial levels, education officials at the district office have started important initiatives to provide ongoing support to the schools. This includes the establishment of cooperative working relationships with other government departments within the district. Although the steps taken are positive, unless some of the management and sustainability issues already pointed to are taken seriously by the education department in the district, effective support provision to the schools will be undermined.

10. EDUCATOR DEVELOPMENT

10.1 Introduction

In this section the focus is primarily on an assessment of the materials that have been developed through this project in the North West Province. The findings presented below are drawn from the separate reports of two of the materials assessors (the full reports to be sent to the provinces concerned). After the summary presentation of their findings under various headings, the teachers' evaluation of the training and materials is outlined.

10.2 Record of Progress and Products

The materials assessed in this evaluation can be divided into three categories. The course material for three training modules for educators; three Educators Guides one of which has an associated Facilitators Guide and Resource file; and various support materials directed as different training activities within the pilot schools. The titles of the training modules looked at are listed below.

Unit 1: Inclusive Education and Change: An Introduction²

Unit 2: Assessment for Inclusion

Unit 3: Towards Exclusive Schools for All. Inclusive Education in Action: Interventions for Meeting Learner Needs

10.3 Accreditation of Programmes

The materials assessor focusing on the acceptability of the educator development materials for accreditation purposes said that collectively the three units do not yet meet the full requirements for one module of 12 credits for SAQA registration. However, only minor adjustments and additions need to be made to make the course acceptable as a module of 12 credits in an NPDE (National Professional Diploma in Education) (Level 5) or an ACE (Advanced Certificate in Education), which is Level 6.

With regard to the modifications that are required, it is advised that the use of 'notional learning time' should be more clearly defined. This should include setting out the criteria for evaluation of the teacher's performance and competence. This would require that the teachers produce portfolios, complete structured written assignments and oral presentations for marks.

10.4 Congruence with White Paper 6

The content of the three units is consistent with the principles and philosophy of inclusive education outlined in White Paper 6. In the evaluation of the materials, three areas are noted as important in reflecting congruency with the national framework.

² Although the materials submitted by the province are organised into three 'modules' this term has been changed to 'unit'. The accreditation requirements are for three units making up one module.

Firstly, the materials help teachers to understand the influence of contextual issues on the experiences of learners and the learning process. Secondly, the emphasis that is placed on the link between inclusive education and the right to education for all learners is very valuable. Thirdly, the materials explain the paradigm shift that White Paper 6 makes in moving from the special needs/deficit model to addressing barriers to learning, and the need for the system to accommodate a diversity of learning needs. One of the materials assessors makes particular mention of the extensive and informative way in which language barriers are looked at in the first part of the course.

Some weaknesses relating to the congruence of the materials with the national policy framework are also noted. Attention is drawn to some of the terminology used which, it is felt, either slides back into an old label' (e.g. mental handicap) or is too general to provide sufficient meaning for teachers (e.g. hearing difference instead of Deaf learners or hearing-impaired learners). Also pointed to is the omission of a section that sufficiently explains relevant policy documents that form the basis of the national framework (see full report for details).

One of the materials assessors feels that the material does not give sufficient attention to the importance of education support services in the implementation of inclusive education. Specific mention is made of the booklet on ISTs. It is felt that, although the booklet is informative, it *“does not present a coherent framework for the setting up and functioning of ISTs”*.

10.5 Congruence with OBE Curriculum Framework

The assessment of the educator development materials for this province indicates that throughout the material the link between the OBE curriculum framework and inclusive education is made. Specific mention is made of Module 1 where the material on language and literacy is *“well located within an OBE framework and the methods and approaches used make relevant links to inclusive education”*. Specific mention is also made of the three educator guides which include and address OBE outcomes and assessment criteria. However, it should be noted that while this important link is made, the assessor also felt that the *“OBE jargon in the outcomes is often abstract and complex”*, a key weakness emphasised in broader reviews of OBE.

One assessor also points to the second module of the materials that deals solely and specifically with assessment. It is argued that while the module *“contains all the elements of OBE assessment...the presentation of this module as self-contained is contrary to the principle of assessment in OBE”*. Although it is recognised that there are advantages to dealing with this important area in a separate module, there are also weaknesses to this. The most important of these is that the process of assessment is not seen as an integral part of the entire process of teaching and learning.

10.6 Relevance

The evaluation reveals that the materials are relevant to local needs and to the target audience. With regard to the latter, one of the assessors emphasises that both the

content of the case studies used and the problem solving approach adopted are relevant to the teachers. The material draws on the teachers' own experiences and the demands that are made of them as educators within the South African context. The material is also creative and motivates teachers to address the problems they are likely to experience in their practice. The material also encourages teachers to be reflective practitioners and 'facilitators' within a learner-centred approach.

Although the materials, especially the case studies used, are felt to be relevant to the teachers, one of the assessors raises some caution about the perspective in the materials. It is argued that; "*the general approach to the main body of the texts, particularly in Modules 1 and 2 reflects a sophisticated, well-educated, middle class world of experience*". (This is also mentioned in Section 11 under the assessment of the capacity building materials).

10.7 Some Other Curriculum Issues

10.7.1 Accessibility

As already indicated, the relevance of the material to the experiences of the teachers is an important part of ensuring its accessibility. The materials assessors point to a number of important ways in which accessibility issues have been well considered and addressed. Particular mention is made of some of the ways in which the material is presented. Strategies used such as 'concept maps' and 'text boxes' are valuable as learning tools and "*helpful features that make the texts easier to access*".

As will be discussed under teaching strategies, particular mention is made of some of the activities used in the material. Many of these are useful and innovative and in this way make difficult and sensitive issues accessible to the teachers.

Although the language and tone used in the materials are accessible and there is clear evidence that a 'user friendly' approach has been developed, some weaknesses exist in this area. It is felt that in a number of cases both the words used (terminology, vocabulary and expressions) and sentence structure are too complex and sophisticated (see full report for details). In most cases, where these problems exist more accessible every-day English vocabulary can be used and sentences made more simple. This will not compromise the meanings of the text. It should also be noted that both assessors regard the tone of the materials as 'patronising' at times.

Some concern was also raised about the 'denseness' of the information contained in the materials, particularly in relation to the time that is allocated for it to be processed. This links to language accessibility where "*lengthy extracts from policy documents, papers and articles*" contain language than "*is more complex than the main text*".

10.7.2 Aims/outcomes

Each module has clear and specific outcomes. However, at the moment there is insufficient evidence about how these outcomes will be demonstrated through the assessment criteria included at the end of each learning phase. That is, the link

between the assessment criteria and the intended outcomes is not yet sufficiently made.

Some attention also needs to be given to ensuring that the materials enable teachers to play the seven roles stipulated by the Norms and Standards for Educators. Although this requirement has not been fully met as yet, it is suggested that the changes require minimal reorganisation.

10.7.3 Content

The three units that make up the educator development materials, including the supplementary materials and guides, are a valuable resource for the training of teachers around inclusive education. The materials assessors describe a number of areas that they regard as having been done extremely well, with valuable insight and information being given to teachers. Specific mention is made about the positive way in which language barriers and diversity issues are addressed. Similarly it is felt that the way in which intrinsic and extrinsic barriers are dealt with in the materials is well done, and as already mentioned, congruent with the key concepts and philosophy of White Paper 6.

The materials assessors argue that the materials bring together theory and practice around inclusive education well, with a number of the sessions covering practical applications for intervention techniques and strategies. Specific mention is made of the excellence of the case studies and Unit 3.

It is also felt that the way in which the curriculum is structured, that is, the logical progression of the information and activities, is good. This includes the connections that are made between the three units in the module. The curriculum content allows for teachers to reflect on their own experiences and then to draw on these in learning about new knowledge and techniques. However, one of the assessors says that in relation to the organisation of the curriculum content, some minor reorganisation should take place (specific recommendations are listed in the full report).

One assessor emphasises that issues around people with disabilities has been handled well, especially in Unit 3. S/he states; *“Module 3 in particular provides an excellent model of an informative, insightful, compassionate and unbiased approach to both disabilities and forms of abuse”*.

10.7.4 Teaching strategies

Both assessors make positive comments about the teaching and learning approach that is used throughout the materials. It is facilitative, interactive and developmental, allowing participants to draw on their own experiences and to develop new knowledge and understandings. One assessor emphasises, in particular, the way in which the activities *“provide opportunities to develop real conceptual understanding”*. Once again the case studies are referred to as extremely valuable strategies.

One important concern raised by one assessor relates to the lack of learning theory background. The strategies used in the training need to be *“backed up sufficiently by*

theory” so that teachers understand approaches they are using. The assessor explains this point very well using examples from the material. S/he says; “*For example there is no mention of the theory of social or dialectical constructivism, and although it may be implicit in the text it needs to be made explicit. In the power of working together (p.1-73) co-operative learning is dealt with quite superficially in that only one approach namely the Jigsaw method is explained. Co-operative learning is regarded as essential in an inclusive classroom but there is more to co-operative learning such as explaining the role of each person during the group work*”.

10.7.5 Assessment procedures

As already indicated the modules contain assessment criteria at the end of each learning phase. However, at the moment these need to be more clearly linked to the intended outcomes of the training. These criteria would need to be more carefully structured within the overall accreditation framework for the course.

10.8 Feedback from Teachers

Although the evaluation of the training materials presented above is important, equally important are the perceptions of the teachers who participated in the training programmes. Teachers were asked to comment on both the usefulness of the actual training as well as the materials.

10.8.1 Was the training programme useful for the teachers?

Table 4.11

Answer type	No of teachers	% of total responses (to question)
Yes	101	92.7%
Not sure	5	4.6%
No	0	0
No answer	3	2.8%

The table above shows a very positive response from teachers to the training programmes. 93% indicated that they found the training useful with only 5% indicating that were unsure about its usefulness. It is also important to note that no teachers said that the training had not been useful.

10.8.2 What parts of the training programme were most useful?

Teachers listed a broad range of areas that they found had been useful in the training. They appear to have found the entire training process useful. Two areas that have been most useful are:

- The training programmes that addressed barriers to learning and the diversity of learning needs among the learners were very useful. Teachers emphasised those aspects of the training that had helped them to identify barriers as well as the practical skills that they had learnt to overcome barriers.
- The other area most commonly mentioned was the training that dealt with assessment methods. Some teachers explained that this had been especially helpful within the framework of the OBE curriculum.

Other areas that teachers noted as useful can be summarised as follows:

- Clustering schools and creating opportunities for discussions with other schools was very useful.
- Specific teaching strategies for learners with particular disabilities e.g Blind learners
- Innovative teaching strategies that accommodate diversity and promote different capabilities among learners
- Emphasis placed on the rights of all learners and the importance of teacher attitudes in ensuring the inclusion of all learners

10.8.3 Which parts were not useful or least useful?

In general few teachers listed aspects of the training that had not been useful or of little use. In a number of cases the areas identified were the same areas mentioned by other teachers as most useful. It is not unexpected that teachers respond differently to different aspects of the training. Having said this, however, one issue appears fairly common among the few responses. A number of teachers expressed a concern that not enough training had taken place around the accommodation of particular learners with disabilities. This included the challenges of including learners with disabilities in their classrooms and the skills needed to meet the learning needs of these learners.

10.8.4 Were the teaching and learning materials helpful?

Table 4.12

Answer type	No of teachers	% of total responses (to question)
Yes	95	87.2%
Not sure	7	6.4%
No	1	0.9%
No answer	6	5.5%

The responses from teachers to this question indicated that most of them found the teaching and learning materials helpful (87%).

10.8.5 In what ways has this material been helpful?

Once again the responses to this question show a broad range of opinions about what parts of the materials teachers had found especially helpful. Although many of the areas mentioned refer to greater awareness about issues to do with inclusive education, the most common responses point to practical skills learnt from the materials. Some teachers expressed this as ‘concrete examples’, ‘tips’, assessment methods, different styles of teaching, disciplinary issues, “*how to cope with frustration*”, “*teaching aids*” and “*inclusive methods*”.

Some teachers also expressed the view that the materials were helpful in getting them to reflect on their own practices, sometimes in a way that confirmed for them that they were already using inclusive practices.

10.8.6 Why have the materials not been helpful?

Only two responses were received for this question. One teacher felt that although the material had helped to identify learners experiencing barriers to learning, they had not helped enough in providing practical advice to deal with them in the classroom.

Another teacher said that there had just been too much material to get through in the available time.

10.9 Summary and Comment

The evidence collected from teachers about their experiences of the training programmes and materials indicates a very positive response to their participation in this component of the project. There is an especially positive response to the training programmes where, as already indicated in previous sections, teachers appear to have gained most from the teaching strategies and methods learnt. There is also substantial evidence that points to important attitudinal changes and increased awareness among the teachers.

The assessment of the training materials also points positively to a number of ways in which they meet important requirements of the project. Of particular importance here are the comments made by the assessors about the congruence of the materials with White Paper 6 and the OBE curriculum framework. These two areas are felt to be important strengths in the materials. The materials assessors also emphasise the effective and creative use that has been made of cases studies in the materials. This strategy or method is seen to be important in improving the accessibility of the materials for the target audience and ensuring that they are relevant to their experiences in the classroom.

The reports from the assessors point to the valuable way in which the materials enable the teachers to draw from their own experiences and, at the same time, challenge dominant perceptions and contribute to new forms of knowledge. The materials are also considered to be good in some areas in bringing together theory and practice around inclusive education.

The materials assessors mention some weaknesses that will need to be considered. It is felt that the materials do not yet fully meet university requirements for accreditation purposes. The adjustments needed, however, are minor and could be addressed fairly easily. The accessibility and relevance of the materials to the target audience is undermined at times by difficult language and dense information. It is also pointed out that although important strategies are used in the materials to train the teachers, the theory behind them is not sufficiently explained. There are also some omissions in the materials with regard to linking the expected outcomes with particular strategies for assessment.

11. CAPACITY BUILDING OF SUPPORT PROVIDERS AND MANAGERS

11.1 Has the project provided adequate capacity building to the Project Management Team and Project Support Team to enhance their capacity to provide support to the schools concerned?

Two of the members of the PMT said that they felt that they had received adequate capacity building through the project. However, one member of the PMT did not answer this question and the member of the PST who filled in the questionnaire was unsure about how s/he felt about the capacity building process. The 'mixed' response to this questionnaire suggests that there is some ambivalence among the members of the teams about whether they have received sufficient capacity building to provide support to the schools.

11.2 What training/capacity building is still needed for district officials and members of the support team to be able to provide adequate support to the schools?

When members of the teams were asked to identify what training/capacity building they would like to assist them, the response was minimal. One member indicated that skills around planning and problem solving would be valuable. Another member said that a deepened understanding of systemic assessment and intervention would be very valuable in supporting inclusive education in the schools.

11.3 Assessment of Capacity Building Materials

One of the material assessors from the national quality evaluation research team evaluated all the capacity building materials. In this province, this included:

- all training materials used for the training of members of the DST
- material for the training of district education officials to train the SGB around inclusive education
- material for an awareness raising exercise with teachers around people with disabilities
- a workshop programme for ECD educators.

In looking at the congruence of the material with White Paper 6, the assessor addressed a broad range of issues touching on both the content of the White Paper and its underlying philosophy and principles. She also focused on the relevance and accessibility of the materials for the target audience. Also addressed is the relevance of the materials to the local needs of the North West communities involved in the project. The findings below are a summary of her views on these issues.

11.3.1 Congruence with White Paper 6

The congruence of the materials with the overall framework of White Paper 6 is noted as a strength across all the materials examined. In particular, the content of the materials creates opportunities for awareness to be raised and attitudes to be changed among members of the different target audiences.

Particular mention is made of the value of the capacity building materials for the training of the DST to enable them to play the role envisaged for them in the White Paper. This includes reflective thinking around existing roles and insights into current transformation processes taking place within the education system. Mention is also made of the important way in which assessment methods and practices are addressed in the material, drawing from both local and international experience.

The materials aimed at raising awareness and challenging stereotypes among educators about people with disabilities is also regarded as being congruent with White Paper 6. The material is useful in showing how barriers to learning arise from negative attitudes and stereotyping. The assessor emphasises the way in which the materials “*equip the educator with skills on how to approach and interact with various disability specific categories*” in the classroom. However, the assessor also points to an important weakness within this material. While important information is included it does not sufficiently “*build the understanding of equality and equity practices (among teachers) as it relates to disability*”. It is recommended that although this material is aimed at educators it would provide a valuable resource for the training of parents within the SGB.

The training module for district education officials to train members of the SGB is consistent with the national policy framework and provides important information around barriers to learning. Concern is raised, however, about the manner in which disability issues are dealt with in the materials. The assessor says that while one of the aims of the training is to overcome stereotyping, the visuals used in the material tend to reinforce particular stereotypes (see full report for more details). It is also felt that at times the terminology used falls into the trap of reinforcing existing divisions between learners, especially between able-bodied and disabled learners.

The material used for educators at the ECD level is also consistent with White Paper 6 and importantly, with the framework of OBE. Particular mention is made of the way in which the materials allow for critical thinking and the identification of important barriers to learning. A slight concern exists regarding the generic nature of the content of the materials. It is recommended in this regard that the information be deepened to include a more diverse range of barriers that learners may experience. It is also felt that at times the terminology falls back into ‘old’ language such as

'special needs children' and does not sufficiently promote inclusive practices that incorporate all potential learners.

11.3.2 Relevance

The assessor is of the opinion that the materials used for capacity building are relevant to local needs and are flexible enough to allow for adaptation in different contexts within the province and district. It is felt, however, that the materials need to cover a broader spectrum of barriers, particularly those that are prevalent within the province and district. This is especially reflected in the examples used. In this regard, the assessor makes particular mention of Foetal Alcohol Syndrome which is recognised as a serious barrier to learning in the province. Similarly, the many effects of HIV/AIDS on families, and the associated socio-economic conditions of these families is not given sufficient attention. Having said this, however, it is felt that the issues associated with dysfunctional families is handled very well in the materials. In general the materials are relevant to the target audiences. The assessor mentions a number of ways in which the materials relate to the existing experience of the target audience. They also allow for a process of critical thinking that evaluates existing attitudes and roles, and facilitates new understandings and attitudes.

Although the visuals used are generally regarded as very good they "*present a middle class income grouping which does not relate to the intended target audience*". This point is emphasised in the disability awareness raising materials where the examples used reflect "*the abilities of affluent and advantaged adult persons with disabilities*". Although this is important in raising awareness about the abilities of people with disabilities, it is recommended that other examples, reflecting a more diverse range of backgrounds, could be used and would make the materials more relevant.

11.3.3 Accessibility

The materials are all well presented. Particular mention is made of the training materials for district officials to train SGB members as being very good in terms of accessibility and general appeal. Where visuals are used they are generally regarded as creative and effective. The language used is regarded as appropriate for the target audience.

Recommendations for improvement include the concerns raised with some of the visuals, improving the layout at times to make it more user friendly, and simplifying the presentation of the information, especially in materials for DST training (specific recommendations for each of the materials looked at are included in the full report).

11.3.4 Other curriculum issues

The programmes and materials assessed are recognised as valuable resources in changing attitudes and building awareness. There is also a clear sense that they allow for each of the target audiences to be taken through a process that is designed to strengthen their existing skills and at the same time increase their capacity for critical thinking. Although the materials cover important role players, including

educators at the ECD level, it is felt that the learner component of the school community could have been included as a target audience.

11.4 Summary and Comment

The small number of PST and PMT members who filled in the questionnaire makes it difficult to get a clear sense of their feelings about the value of the capacity building activities in which they have been involved. Among those who did respond some positive feedback was received as well as some ambivalence about its value for them.

From the material assessor's perspective, however, the capacity building materials developed for the project in this province are valuable resources for building inclusive education in the province. Most importantly, they are congruent with the national policy framework. The material for the training of the DST is seen as important in taking forward its role as discussed in White Paper 6. The assessor emphasises the strength of the materials in developing critical thinking and raising awareness among the different role players. A number of examples are given which indicate innovative and creative approaches to the material, making it more accessible to the people concerned.

Although the materials deal well with disability issues in some respects, the assessor raises some concerns in this area. It is felt that the material does not sufficiently take forward some of the issues that are important to challenging existing stereotypes and translating a 'rights' approach into practice. It is also suggested that although the materials are broadly relevant to local needs and accessible to their target audience, some attention could be given to strengthening these aspects in the material.

Although this section of the evaluation concentrated on perceptions of the quality of the capacity building undertaken and the materials used, the challenges around management and sustainability mentioned earlier by role players indicate that capacity building remains a key challenge in this district. This challenge exists from the provincial level down to the SGBs. It is important that materials developed to facilitate such capacity building programmes are able to address and take forward some of these challenges. In particular, the training and materials need to equip people with adequate knowledge, understanding, awareness and enthusiasm to appropriately plan and manage the implementation of White Paper 6 in the district and province.

12.CONCLUSION

The 'picture' that has been gained through this evaluation of the pilot project in the North West province is an extremely positive one. It shows that hard work has gone into ensuring that, despite time and resource constraints, it has had a very positive impact on the pilot schools involved. The commitment shown by the project co-ordinator, the members of the consortium, including the action researchers, and some supportive colleagues from the department has been a key factor in contributing to its 'successes'. The gains made through the project need to be seen within the context of many challenges that have arisen from restructuring within the

education system in the province and the ongoing resource limitations faced by schools. It is also a province in which the psychosocial barriers impacting on many of the learners are extensive.

The project has been especially valuable as a 'tool' for equipping teachers to implement the new policy on inclusive education. The project has managed in a number of ways to facilitate attitudinal change among the teachers and at the same time provide them with knowledge and skills to translate this into practical activities in their classrooms. There is no doubt that the combination of the training and action research approaches used has contributed to this. Evidence collected from teachers in the pilot schools shows that the teachers view the project in very positive terms. Their responses, especially around the perceived benefits of the project for the schools and its value for them, show that they have developed an increased awareness about the importance of recognising and addressing barriers to learning. They have also made important links between inclusive education and OBE. At the school level as well, where the ISTs are up and running, they are perceived by teachers and principals to be doing valuable work. The examples of activities the ISTs are doing in the schools show congruency with the role expected of them in White Paper 6. The evaluation of the educator development materials and those used for other capacity building activities shows that they are extremely valuable resources for the ongoing development of inclusive education in South Africa. Where suggestions for improvements are made these largely relate to 'making them better resources' and building on core aspects that are already there.

The central challenges for taking forward the policy implementation process in this district can be regarded as challenges that exist in many other districts in South Africa. They are challenges that are about implementing policy changes in general and in building inclusive education in South Africa. Three areas stand out as being particularly important.

- Firstly, the project has pointed to the need for education leaders at the provincial and district level to provide more leadership in taking the policy forward in the district and the province. This includes facilitating, in particular, the integration of inclusive education into all areas of the department's responsibilities and ensuring that all education officials are committed to the implementation of White Paper 6.
- Secondly, and linked to the leadership challenge, is the need for the setting up of a well functioning DST that can provide ongoing support to the schools. The setting up of this structure is seen as critical to sustaining the gains made through the project. This team should be made up of a range of people who can bring together different skills needed by schools to address the many barriers that undermine learning and teaching in the classroom and schools. In this regard, despite some important initiatives that were undertaken by the project, improving community school partnerships remains an important challenge. This includes making more active use of the expertise of people from local NGOs and disabled peoples' organisations (DPOs) to support the schools. Greater involvement of the community in the schools was emphasised as important by the principals from the project as well as other role players.
- Thirdly, the project has shown that work needs to be done on developing the capacity of special schools/resource centers within the district to become more

involved in contributing to the building of inclusive education. This process will require leadership and commitment to support these role players to embrace their new role and work collaboratively with the other schools in the district.

CHAPTER FIVE

NATIONAL OVERVIEW

1. INTRODUCTION

This chapter brings together the findings of the evaluation in the three pilot provinces. The national overview that is presented here has therefore been developed from: the analysis of questionnaires sent to the principals and teachers in the pilot schools as well as members of the Project Management Teams (PMTs) and Project Support Teams (PSTs); focus group interviews with members of the three PMTs and PSTs; as well as input received from members of the three consortia either as participants in the focus group interviews or from a postal questionnaire sent to the consortia leaders. It also draws from a focus group interview held with some staff members of the Inclusive Education Directorate at the National Department of Education. The overview that is presented here is therefore primarily a picture that emerges from the school and district level, with some input from the national level as well. As with the provincial chapters the findings are discussed under key themes that were used to guide the questions asked in the questionnaires and interviews or which emerged through the analysis of the data.

While this chapter attempts to provide a synthesised ‘picture’ of the entire project, it is important that the findings discussed here are looked at together with the next three chapters of the report. These chapters deal with learning from ‘good practices’ from the project, the development of indicators for inclusive education that have ‘arisen’ out of the pilot projects and the key recommendations made by the national quality evaluators.

One of the most important findings from synthesising the data from all three provinces is the strong similarities that are evident across the country. Despite the differences between the provinces and therefore the contexts in which the projects and the policy have been implemented, clear trends emerge. There are similarities in particular in; the benefits the project is seen to have had in the schools; the role which it has played in supporting the policy implementation process; the links that teachers have been able to make between inclusive education and outcomes-based education (OBE); the skills which teachers have gained through the educator development component; and, perhaps most importantly, where key challenges for the ongoing implementation of White Paper 6 lie. Although, as Chapter Six illustrates, in each province different things have ‘worked better’ than in other provinces, even in this area there are strong similarities. Where something has not worked well in one province, it is generally still recognised as an area of importance for the ongoing effective implementation of White Paper 6 in the province.

2. BENEFITS OF THE PROJECT

There is a general sense among all the role players across the country that the pilot schools benefited from being involved in the project. In all three provinces the majority of teachers, principals and members of the PMTs and PSTs responded positively to this question. However, it is important to note that a considerable percentage of the respondents felt that the benefits to the schools had not been

significant. Across the three provinces, between one third and one half of the respondents said that they felt the schools had benefited, but 'not very much'. The reasons given by the few respondents who felt that the schools had not benefited provide some insight into where these reservations may lie.

It is important to note the reasons given by the respondents as to why they felt their schools had benefited. They relate to the meeting of important objectives set by the project at its inception. In all three provinces important attitudinal change has taken place. Of particular value has been the increased awareness among teachers of the differences in learning needs among the learners in their classrooms. This includes the importance of respecting and accommodating these needs. Linked to this is the evidence which points to a deepened understanding of barriers to learning and their impact. In this regard most of the teachers indicated throughout their responses how they had learnt new and valuable skills, including how to address barriers to learning.

While the issues mentioned above seem to stand out as the central benefits, role players across the three provinces also said that the project had increased collaboration, especially between the teachers, and that the project had led to improved community involvement in the schools. Throughout the evaluation process it has become clear that the project has contributed, although to varying degrees across the provinces, to bringing the schools closer to their communities. The project also seems to have had some benefit in either raising awareness about the importance of physical accessibility, especially for physically disabled learners, or in some cases refurbishments to this end have already taken place.

The reasons given by the respondents as to why the schools have not benefited largely point to the issue of resources. In some cases, the project raised expectations of more resources for the schools, or the problem was perceived to be in terms of the lack of resources that undermined any potential benefits from the project. The lack of resources seems to be linked to issues around the ineffective functioning of some of the schools and the impact of this on restricting the benefits of a project of this nature.

In summary then, both the positive benefits listed and the constraints noted suggest that the main benefits of the project for the schools have been around building the capacity of key role players in the schools to implement the new policy changes. This includes awareness and understanding about the new policy and the impact of barriers to learning on the learning process. Teachers have also benefited from the project by acquiring new skills to practice inclusive education in the classroom. The benefits of the project for the schools have therefore been mostly of a qualitative rather than a quantitative nature. That is, it has helped people to understand and do things differently rather than provide more resources to the schools. Although improving conditions in the schools is very important for the policy implementation process, if the key role players do not understand the new policy, support its objectives and feel confident to implement the changes, the policy will not be successfully implemented even where there are high levels of resources. In this way the project definitely benefited the schools involved. Its contribution in assisting the policy implementation process will also be discussed later in Section Five of this chapter.

3. WHAT WORKED?

In the last three chapters, which describe the findings of the evaluation in the three provinces, people's perceptions of the benefits of the project were very similar to the things that they felt worked 'best'. Understanding why they worked well and how they were able to bring about important changes is very important if we are able to learn from this project and use it to assist the implementation of White Paper 6 in the rest of the country. For this reason what has worked in this project is discussed in more detail in the next chapter.

In all three provinces there were a wide range of things that worked well in the project. They include structures that were set up, training and capacity building activities that were undertaken, partnerships that were developed as well as resources (including organisations) that were used. It also includes specific 'change' strategies that the role players feel were especially useful in supporting the project. Although there were a number of things that worked well at the district level, the 'success stories' appear to be mostly evident at the schooling level, especially with the teachers involved in the project. As Chapter Six will show, however, where things at the district level worked well, they added significant value to the project, especially in providing schools with the support that they need.

4. KEY DIFFICULTIES AND CHALLENGES

Although the provinces faced some different challenges, once again there are strong similarities as well. Two important areas stand out that collectively capture most of the challenges experienced by the provinces.

Firstly, many of the problems identified by the provinces relate to *general problems in the delivery of education services in the provinces*. For example, the restructuring of the education departments in each of the three provinces has had a negative impact on the project, most importantly, in the turnover of staff or in shifting areas of responsibility within departments. The Eastern Cape and North West Provinces seem to have been most affected by these changes. Challenges related to the delivery of education services also include issues such as the lack of integrated strategic planning across divisions within the education department. This has meant that despite much hard work by some of the education officials and project role players, inclusive education is not sufficiently linked with important areas such as OBE, HIV/AIDS and school management initiatives.

Secondly, challenges arising from *problems in the functioning of the schools* capture one major area of difficulty experienced across the three provinces. There are continuing problems around resources, the culture of teaching and learning in schools and the 'overload' experienced by teachers in relation to their work and the policy changes that affect them. It is to be expected that in a context where these problems exist, the implementation of any policy will be difficult. So while some of the challenges are specifically about implementing inclusive education, they are mainly about implementing new policy and managing change in the schools.

While it is very important to recognise these challenges, the ‘successes’ in this project, that is, what has ‘worked’, show how inclusive education can be used as a strategy to address some of these problems. This link between the challenges and ‘good practices’ are discussed in the next chapter.

More specific challenges relating to the experience of implementing the new policy through the project are summarised below. This list includes data gathered through the evaluation process from role players in each of the three provinces as well as those at the national level. The points noted above are not repeated in this list.

- A number of *practical challenges around the teacher training* component were experienced. The challenges were not about the quality of the training but rather about when the training took place, how the workshops were organised, and feelings of work overload experienced by teachers.
- Although, as will be discussed in Section Ten of this chapter, the teacher training across all three provinces appears to have been extremely beneficial, there is still a feeling that *more training is needed*. This relates both to the need to sustain what has been learnt through the training already undertaken and the need, expressed by some of the teachers, for more skills to accommodate all learners, especially those with disabilities.
- There are still *fears* among some of the teachers about how they will ‘cope’ with the inclusion of learners with ‘severe’ disabilities in their classes.
- It was felt by a number of the role players that *insufficient leadership and guidance* has been provided by the national and provincial departments of education to assist with the policy implementation process at the district level. Where such leadership has existed, especially after the official launch of White Paper 6, this has been extremely beneficial to the project. There is a strong sense among all the role players that the ‘buy in’ or support from senior managers for inclusive education is critical for the effective implementation of White Paper 6.
- In all three provinces the *setting up of the District Support Team (DST)* has been a major challenge. There are both similarities and differences in the reasons why this has presented such a challenge. However, the lack of an effective functioning DST in the pilot districts remains a critical challenge for the provision of ongoing support to the pilot schools.
- Although the setting up of the *Institutional-Level Support Teams (ISTs)* in the pilot schools has been effectively implemented, *ongoing support to and capacity building of these structures* is extremely important.
- In general there is a concern that the gains made through the project will not be sustained.

5. ROLE OF THE PROJECT IN POLICY IMPLEMENTATION

In the questionnaires teachers and principals were asked whether they felt that the project had assisted teachers to understand and implement the new policy. This part of the evaluation was intended to contribute to drawing out lessons for the implementation of this policy in other parts of the country, and for general education policy implementation. In this project a combination of strategies were used to implement White Paper 6. This included a ‘top-down’ approach reflected by the

introduction of the new policy, as well as a 'bottom-up' approach which focused on action research, training of teachers in the pilot schools, and capacity building at the district level. The questions raised in the evaluation were aimed at finding out what the different role players' experiences were in relation to the success of these strategies in helping to implement the new policy. Once again the responses to this area of investigation correlate strongly with the perceived benefits of the project and 'what has worked'.

Across all three provinces the majority of teachers and principals responded positively to this question although there were also a large number in each case that were unsure about the impact of the policy. The positive responses point strongly to two very important ways in which the project has assisted the policy implementation process. Firstly, the project has contributed to important attitudinal changes among teachers that are central to the paradigm shift explained in White Paper 6. Of particular importance here are the changes in attitudes towards learners with disabilities and the location of this understanding within a 'rights' framework (that is, recognising that all learners have a right to equal education provision). Secondly, this attitudinal change through the project has extended to a deepened understanding among teachers about key issues critical to the policy and its effective implementation (that is, they understand the policy better and what it means in practice). Generally, there is a sense among the majority of teachers across all three provinces that they have learnt more about the government's new policy through the project. This extends to understanding the importance of being able to recognise and address barriers to learning and to see this role as an important component of good teaching. Linked to this is a greater understanding and awareness of the importance of accommodating different learning needs within the classroom, including seeing learners as 'unique', each with his/her own capabilities and strengths. As the next section will show, some teachers have recognised this aspect as central to the effective delivery of the OBE curriculum to all learners. Although these two areas stand out, it should also be noted that the project has also contributed to the setting up and development of some of the key structures provided for in White Paper 6, in particular the ISTs.

It is very important to recognise and acknowledge the importance of the project in supporting the policy implementation process. Many important theories about policy implementation argue that getting the role players or social actors who are involved in its implementation to support the policy is critical to effective implementation. Such support is dependent on a real understanding of what the policy is all about as well as the belief from the role players that the policy is important for bringing about changes that will improve their lives. In the opinion of the evaluators, the project has made a critical contribution to the policy implementation process in this regard. It has demonstrated the importance of this 'buy in' from role players in supporting the policy implementation process. It has also shown the value of the 'top-down'/'bottom-up' approach of policy implementation. All the role players, especially the service providers and project co-ordinators need to be commended for the appropriateness of their sustained input in contributing to such change. For the implementation of White Paper 6 more broadly, the value of 'investing' in teachers in this way should not be underestimated.

Despite the importance of such processes for policy implementation, the project has also shown that this approach is an extremely 'resource-intensive' one. This is particularly so in relation to the human resource investments that need to be made and the time that needs to be invested. This approach requires a range of different skills and competencies and effort to bring about the changes that need to take place. This challenge points to some of the things that teachers and principals feel could be done to assist them more in the policy implementation process. Essentially they said that teachers need more training, more awareness raising, more resources and more support. In particular, many teachers said that they would like to acquire more practical skills to put 'the theory into practice' in their classrooms.

This need expressed by the teachers, points to a serious limitation of the project in contributing to the policy implementation process. As already highlighted in the first phase of the national quality evaluation, the time-frame of the project has been unrealistic for its intended objectives. Although many of the challenges highlighted throughout this evaluation point to general problems of policy implementation, especially in very disadvantaged contexts, others point to constraints imposed by the time-frame. There has just not been enough time to fully 'pilot' the policy within the three districts. It is felt, as discussed in more detail in Chapter Eight that the important 'first steps' put in place by this project must be sustained and taken forward in a number of ways.

6. THE INTEGRATION OF OBE AND INCLUSIVE EDUCATION

Throughout this project all role players have shown awareness of the importance of making the conceptual link between inclusive education and OBE. This link needs to be made by teachers in the delivery of the curriculum in the classroom to ensure that all learners are included. It also needs to be made by those involved in the planning and delivery of education services at the district, provincial and national levels. So it is a pedagogical (teaching) issue and a management issue. For these reasons part of the evaluation process focused on the extent to which teachers had made the link between inclusive education and the OBE curriculum. The materials used to train the teachers were also evaluated according to this criterion (that is, did the materials help teachers to make this link). The evaluation also attempted to find out from the members of the PMT whether this link had been sufficiently made at the departmental level, mainly through the integration of inclusive education into all areas of departmental responsibility, especially the OBE curriculum.

The evidence collected through the evaluation shows that across all three provinces more than three quarters of the teachers felt that the project had helped them to make this link. The strongest evidence confirming this comes from the examples or areas of skill that teachers listed as the ways in which they have been assisted to make sure all learners are included in the OBE curriculum. Examples given by the teachers show that they have learnt about the importance of allowing learners to learn at their own pace. There are also a number of examples that show support and understanding about learner-centred teaching strategies and the value of co-operative learning, including peer support. There is also evidence from the 'practical skills learnt' in the next section of this chapter that what has been learnt is strongly congruent with the OBE framework.

In general the assessment of the educator development materials show that all three provinces have considered this important link in their training materials, although there are some differences in the degree to which the link has been made and how it is addressed. More details of these findings are presented in the provincial chapters in this report and form part of the individual reports submitted by the material assessors.

Information about the integration of inclusive education into central strategic planning and management processes in the education departments in the district could only be collected through the questionnaires from PMT members in two of the provinces. However, throughout the evaluation there has been plenty of evidence, particularly in the challenges highlighted by people, that this area has been a key weakness in the project, and can be regarded as an obstacle to effective implementation of White Paper 6. Although there is some recognition of the link by people directly involved in the project, this is not necessarily the case with their colleagues or with senior management in the province and this has undermined its integration within central planning processes. As Chapter Seven in this report shows, the integration of inclusive education within all areas of responsibility within the education departments is a key 'indicator' of the effective organisation and management of inclusive education. Although this point is repeated a number of times in this report, it cannot be emphasised enough as an area requiring attention.

7. PRACTICAL IMPLEMENTATION OF INCLUSIVE EDUCATION IN THE CLASSROOM

Through the questionnaires teachers were asked to indicate whether they had learnt practical ways to overcome barriers to learning in the classroom. In all three provinces the teachers responded very positively to this question. The teachers' responses also showed that they had learnt relevant skills within all key areas of the curriculum. The areas that received the most attention from teachers were the same across all three provinces. That is, the largest percentage of the teachers in all three provinces said that they had learnt practical skills in these three areas. They are; teaching and learning methods, assessment methods, and the organisation and management of the classroom. The fact that these areas received such strong support from teachers shows that the training in all three provinces has been successful in providing teachers with skills and knowledge in areas central to the develop of inclusive practices in the classroom.

Similarly, in all three provinces the area that received the least attention from teachers was the organisation and management of the timetable. This is not unexpected as it is an area that affects the entire school and is primarily related to the overall organisation and management of the school. However, flexibility in the way in which the timetable is organised and managed is a very important part of developing an inclusive school and needs to perhaps be more emphasised in educator development and capacity building programmes.

Teachers across the three provinces also felt that some of the skills that they had learnt to address particular barriers to learning have been very helpful. Once again, as discussed in the previous sections, the pilot projects have been successful in

developing teachers' awareness and skills around barriers to learning. However, in exploring what teachers feel they still need to learn, the teachers' wish for more practical training to address barriers to learning is very clear.

8. MANAGEMENT AND GOVERNANCE

This section of the evaluation was aimed at exploring management and governance issues around inclusive education at the school and district level. Although already touched on in other sections in this chapter, the issue of sustainability in relation to the gains made from the project is emphasised. This includes the extent to which the members of the School Governing Bodies (SGBs) in the pilot schools have understood the implications of the new policy for their school as well as possible structures and procedures that have been set up or need to be set up to ensure sustainability of the policy implementation process. The latter area draws together input received from the principals, the members of the PST/PMTs as well as those members of the Inclusive Education Directorate of the National Department of Education. Where possible, input from consortium members across the country has also been included. The sustainability issues discussed here are therefore the synthesised perceptions of role players from the national level down to the school level.

At the School Level:

When the principals of the pilot schools were asked whether the members of their SGB understood the need for and the implications of the new policy, the responses show varying degrees of success around this aspect of the project. Some schools appear to have SGBs who, according to the principals, are aware of the policy and understand its implications. Other schools appear to be less confident of their capacity at this level, with their SGBs obviously not 'fully on board' in understanding and supporting the implementation of the policy.

Where structures and procedures to support the implementation of inclusive education have been set up in the schools, the specifics differ from school to school. However, there are some important ones that stand out across most of the schools in the three provinces. These can be summarised as follows:

- ISTs have been set up in most schools. As will be discussed in Section Nine in this chapter, while these structures are up and running in most schools they require ongoing training and support to sustain themselves
- Greater parental involvement in the schools has been achieved through a number of initiatives
- Some schools have made changes to their admission criteria in an attempt to facilitate access for more learners in the community, particularly those with disabilities
- Some schools have managed to or are in the process of making the schools safer and more accessible, especially for physically disabled learners.

At the District, Provincial and National Level:

When role players were asked to address this issue, either through the questionnaires or through the interview process, they were requested to give input

into two areas. Firstly, relating to what management structures and procedures had already been put in place to sustain the implementation of inclusive education, particularly in the pilot districts and the relevant province. Secondly, they were asked to indicate what they felt should be in place to sustain the implementation process. The issues put forward by all the role players are discussed here together. This has been done because in most cases where something is already in place or seen as a valuable intervention in one province, it is recognised as a need in another province. All the issues raised can be regarded as key structures or processes that are important for the sustainability of the policy implementation process and the lessons learnt through the project. Many of the issues raised correlate with those already identified as the challenges of implementing inclusive education. This is not surprising since many of the challenges of implementing inclusive education in South Africa are essentially management and governance issues.

Below is a summary of the key structures and procedures that have already been put in place or need to be put in place to sustain the policy process:

- The *DSTs* have either been tentatively initiated in the three provinces or are seen as an immediate priority. All role players feel strongly that the effective functioning of these structures is essential, especially in providing ongoing and sustained support to the schools and the *ISTs*. Despite the importance of these structures, there have been and there are likely to continue to be many problems in getting them to function effectively.
- Closely related to the above is the need for *inter-sectoral collaboration*, which includes making use of existing Inter-Ministerial Committees and initiatives. There is also a sense that the Department of Education should facilitate collaborative work between government departments.
- All three provinces emphasise the role that the project co-ordinators have played as 'drivers' of the project and the implementation of inclusive education in the districts and province. They all suggest that what has been achieved would not have been possible without the existence of a person who was solely responsible for this area. It is felt that such *dedicated capacity* has to be sustained at both the district and provincial level. Such dedicated capacity is seen to include either the creation of dedicated posts for inclusive education at the district and provincial level or a specific directorate with this responsibility.
- Linked to the above is a concern regarding the potential loss of the skills, knowledge and experience of the three *project co-ordinators*. It is felt that this is a valuable asset to the three provinces in the ongoing implementation of White Paper 6 and should not be lost.
- In general the same feelings are expressed about making use of the *existing capacity of members of the PMTs and PSTs*. Like the co-ordinators, the people involved in these structures have developed important skills and knowledge through the project and this should be harnessed and used for the ongoing implementation of White Paper 6. In general it is felt that more optimal use needs to be made of existing human resources in the provinces to support the implementation of White Paper 6.
- As already discussed in other parts of this chapter, there is a need for inclusive education to be integrated into all areas of responsibility at the national, provincial and district level. This involves *integrated strategic planning* at all these levels to ensure the 'infusion' of inclusive education

issues into all areas of responsibility. Of particular importance is the linking of inclusive education with OBE, education management, and 'planning and provisioning' for the refurbishment of schools and basic infrastructural resources.

- It has been recognised throughout the project that the involvement of the *universities and local non-governmental organisations (NGOs) and disabled peoples' organisations (DPOs)* has been extremely valuable. The ongoing involvement of higher education institutions and NGOs/DPOs is seen as very important, particularly in the area of teacher training and broader capacity building initiatives. All the universities and NGOs/DPOs involved in the project appear to be committed to contributing to the ongoing implementation of White Paper 6 in their provinces.
- The role played by the *special schools/resource centres* in the project has varied considerably across the three provinces. In general, however, it is felt that these schools require ongoing support and capacity building to enable them to play the role envisaged for them in White Paper 6
- In some provinces the pilot schools fall into the *designated 'nodal' areas* of the Department's district development plan. This means that they will be included in the broader incremental plan for the implementation of White Paper 6. However, this is not the case in others. It is felt that where this is not the case, ways should be found to include the pilot schools in the plan to ensure that what has been achieved through the project will be sustained.

9. SUPPORT NEEDS AND PROVISION

This aspect of the evaluation looked mainly at the existence and functioning of the ISTs in the schools. It also attempted to get a sense of whether teachers were aware of what support they could get from both inside and outside the school. Principals were also asked what kind of support they feel the schools need from the department, parents and the broader community. The members of the PMT/PST were then asked a number of questions relating to the organisation and provision of support for schools in the district. The role of the project in supporting special schools/resource centres to develop their own capacity within the framework of White Paper 6 was also explored. It should be noted here that it has been difficult in this chapter to provide an holistic perspective of the responses received from members of the PMTs, PSTs and principals of the special schools/resource centres. In each of the provinces the number of respondents to these questions were very small, making comparison difficult. Where this has been possible the findings are presented below or have been integrated into Section Eight in this chapter. However, for more details around the responses from these role players in this area, the provincial chapters should be looked at in this report.

The evidence collected from the three provinces shows that ISTs appear to have been established in most of the schools. Overall, there is a positive sense from teachers and principals about the role that the IST is playing in their school, and most of the teachers seem to be aware of how they could get support from the ISTs. It would seem therefore that in all three provinces, involvement in the IST has increased teachers' awareness of what the structure is able to offer them.

There are still some teachers, however, who do not know what support is available to them, both inside and outside the schools. The number of teachers who responded negatively to these questions points to important awareness raising and education that still needs to be done to help teachers understand the support that they can get. The findings of the evaluation show that, in all three provinces, the support provided by the ISTs appears to be appropriate to the role envisaged for them in White Paper 6 and valuable for the teachers in their schools. This includes opportunities for collective problem solving, especially around addressing particular barriers in the classroom; and linking teachers to other important resources such as specialist personnel and parents.

When principals were asked what kind of support they felt was needed from the Department of Education, two issues stand out across all the provinces. These are: more training for teachers and, most importantly, more resources. This includes basic infrastructural resources (e.g. toilets, learning materials, classroom space, electricity) and human resources (more teachers). It would seem that for the principals, the lack of sufficient resources in their schools is a major obstacle to the implementation of inclusive education. While the lack of material, financial and even human resources does create a difficult challenge in the implementation of inclusive education in South Africa, in the opinion of the evaluators, based on the evidence from this pilot project, inclusive education could be used as a tool to address these very challenges. The principals also indicated that they would like the parents and members of the community to be more involved in the school, including helping the school with much needed human and material resources.

Where special schools/resource centres have been involved in the project their principals appear to feel fairly positive about their involvement, although there is some ambivalence about the degree to which they have benefited from the project. This is particularly true in relation to understanding their role better within the new policy framework. It is important to note here that none of the principals of the special schools/resources centres who responded to the questionnaire said 'no' the project had not helped them. Thus, even if the involvement has been limited, it appears to have had positive ramifications for these schools. All the principals indicated, however, that to play their support roles in the district effectively, they themselves require more resources, human and material, from the Department of Education.

While this need is recognised it should not be assumed that 'more is better'. This evaluation has clearly shown that much more work needs to be done on explaining the new role expected of special schools/resource centres and, from that basis, realistically assessing what resources are needed to make this work.

10. EDUCATOR DEVELOPMENT

The evaluation of the training of teachers in each of the three provinces involved two main processes. Two 'materials assessors' were contracted to be part of the evaluation team to look at the educator development materials that have been developed by members of the consortia in the provinces. In the questionnaires teachers were also asked to evaluate their experiences of both the actual training as well as the materials.

10.1 Materials Assessment

The materials assessors were asked to evaluate the materials according to five main criteria or focus areas. These were;

- the acceptability of the materials for accreditation according to the requirement for educator development stipulated by the South African Qualifications Authority (SAQA) (level 5 or 6)
- the congruence of the materials with White Paper 6
- the congruence of the materials with the OBE curriculum framework
- relevance to the target audience
- Other curriculum issues including accessibility, clarity of aims/outcomes, content, teaching strategies and assessment procedures

In this chapter a very condensed overview of the findings from the materials assessors is presented, focusing mainly on general trends relating to strengths and weaknesses across the three provinces. What is included in this chapter does not do justice to the richness of the materials developed in each of the provinces or the valuable insights made by the assessors in their reports on each of the provinces. More details of the findings are included in the provincial chapters, and the full reports of the material assessors will also be sent to the provinces for their consideration. In general, however, even where some refinement of the materials is suggested, they are all regarded as an excellent base for training teachers around inclusive education.

With these considerations in mind the following can be regarded as the key findings of the materials assessment process across the three provinces.

Accreditation of Programmes:

According to the materials assessor who focused on the acceptability of the modules (one course module of three units from each province) for accreditation purposes, all three modules do not as yet meet the full requirements of 12 credits/120 hours for SAQA registration. However, although the 'gaps' pointed to in each of the three provinces are slightly different, the assessor argues that only minor adjustments need to be made to meet these requirements.

In two of the provinces the modules are regarded as acceptable at the university level for use in either the NPDE (National Professional Diploma in Education) (level 5) or the ACE (Advanced Certificate in Education) (level 6). In the other province the materials developers have specifically targeted the NPDE (level 5). In that instance, it is suggested that although the materials do meet the standards for this level, as the NPDE is a short-term intervention in the country, the module should rather target the Post-Graduate Certificate in Education (PGCE) at the same level or the ACE at level 6. This would allow the module to have longer-term relevance for the country.

Congruence with White Paper 6:

The evaluation of the materials indicates that all three modules are congruent with White Paper 6. In fact this can be regarded as a strength of the materials in the three provinces. The assessors mention ways in which the materials are consistent with the principles and philosophy of the White Paper. This includes good explanations of the paradigm shift that is made in the White Paper; from a special needs/medical/deficit model to the need for systemic change. The evidence already

discussed in the provincial chapters and this chapter about what teachers have learnt through the project shows how effective the materials have been in helping teachers to look at 'barriers to learning' rather than 'problems in the learner'. Evidence of this paradigm shift can also be seen from the reasons that teachers gave for why the materials had been useful for them. These reasons are discussed later on in this section.

The assessors indicate that, across all three provinces, there are weaknesses with some of the terminology used in the materials in relation to White Paper 6. Either there are instances where the terminology is not consistent with the White Paper or at times it slips back into 'old labels' (e.g. mental handicap). It is suggested that all provinces may want to do a 'terminology check' with the White Paper.

Congruence with OBE Curriculum Framework:

The reports of the assessors indicate a number of ways in which the materials are seen to be congruent with the OBE curriculum framework, although this connection is not always made overtly. The strongest evidence of this connection or congruence has already been described in Section Six in this chapter and the provincial chapters. Here teachers, in describing how the project has helped them to ensure that all learners benefit from the OBE curriculum, give clear examples of the integration of inclusive education and OBE.

Relevance:

The assessors commented on the relevance of the materials for the target audience, that is, the teachers, and to the local needs. In all three provinces, the assessment of the materials showed that they were relevant to the teachers targeted through the training programmes. Particular mention is made of the way in which the materials effectively draw from the existing knowledge of the teachers and their own experiences in the classroom. In all three provinces the case studies used in the materials are valuable in a particularly valuable tool.

Accessibility:

The relevance of the materials is an important factor contributing to their overall accessibility. Besides their relevance for teachers, the materials assessors have noted through the language used and the presentation of the materials the attempts in all three provinces to make the materials accessible to the teachers. Having said this, however, the assessors feel that in all three provinces the materials would benefit from some changes that would make them substantially more accessible. Problems pointed to mainly relate to the density and complexity of information presented and language used.

Other Curriculum Issues:

Other points made by the material assessors address: the inclusion of clear aims and outcomes for the teachers' learning through the training programmes; specific content covered in the materials; as well as the teaching and learning approaches used in the materials, including methods of assessment. The comments made about these issues are very specific to the individual modules and are described in the provincial chapters (and in the full assessment reports).

10.2 Feedback from Teachers

Teachers were first asked to indicate whether they had found the training programmes useful. They were then asked to say what parts had been most useful and which had been of little or no use. In all three provinces the teachers responded very positively to their experiences of the training programmes (between 74% and 93% said that they had found the training programmes useful). The areas identified by the teachers as being most useful covered a wide range of aspects in the training. However, once again, the training around barriers to learning was highlighted by the teachers as very valuable. This includes the identification of barriers and learning practical ways to address them in the classroom. No particular aspect of the training stands out in any of the provinces as having been of no use to the teachers. In fact, very few teachers said that the training had not be useful.

Teachers were also asked to comment on the usefulness of the materials. Once again a positive response was received from the majority of teachers across the three provinces, with most pointing to their value as a resource to practically address barriers to learning and implement inclusive practices. The few concerns that were raised about the materials do not show any distinctive trends across the three provinces or in fact within the province.

11. CAPACITY BUILDING

This aspect of the evaluation included two main processes. Firstly, members of the PSTs and PMTs were asked to comment on whether they felt they had received adequate capacity building through the project to support schools. They were also asked to identify what kind of capacity building was still needed for district officials and members of the support teams to provide ongoing support to the schools. Secondly, one of the materials assessors evaluated all the materials that had been used by the provinces in training and capacity building activities with school management, governance structures, the DST, members of the community or any other identified role players.

11.1 Capacity Building of Support Providers and Managers

In all three provinces the data obtained from members of the PSTs and PMTs who responded to this question in the questionnaires, is very limited. Where responses were received they point to a general sense of ambivalence among the teams as to whether they had received adequate capacity building through the project. Some members said 'yes' they had received adequate capacity building, while others said that they were 'unsure'.

There was also a very limited response from the members about the kind of capacity building that they would like to get to be able to support the schools more effectively. The responses that were received largely point to specific skills that some members felt would be of benefit to them in supporting the schools. In general, all three provinces recognised the need for further capacity building among education officials and service providers to enable them implement inclusive education effectively.

The mixed and limited nature of the responses received to the questions dealing with the capacity of members of the PST and PMT suggest that this area has not received significant attention in the project with people clearly having had different experiences. Although it is difficult from these responses to get a clear 'picture' of how confident people at the district level feel to play the role expected of them in the White Paper, it would seem that it remains a challenge for the future. It should be recognised as a challenge for the provision of effective support to the schools and in the overall management of inclusive education in the district.

11.2 Capacity Building Materials

Once again it is important to state that this chapter cannot do justice to the wide range of interesting and innovative materials that were used in the pilot projects or the valuable insights into the materials provided by the assessor. More detail is included in the provincial chapters and in the detailed reports of the assessors that will be sent directly to the province. The detail provided in these chapters and in the reports, in particular, show that each of the materials needs to be looked at on its own and as part of the 'package' used by the province. The diversity of the capacity building materials used makes it difficult to highlight any findings that are consistent across all three provinces and within all the materials looked at. This diversity, however, allows for the 'strengths' from each of the provinces to be brought together to create a very valuable national resource for capacity building towards the implementation of White Paper 6. The summary below provides some brief comments from the evaluation process in relation to the criteria used to assess all the capacity building materials.

In looking at the congruence of the material with White Paper 6, the assessor addressed a broad range of issues touching on both the content of the White Paper and its underlying philosophy and principles. She also focused on the relevance and accessibility of the materials for their target audiences, which were often very different, ranging from departmental officials to parents. The assessor also looked at the relevance of the materials to the local needs of the communities involved in the project.

Congruence with White Paper 6:

The capacity building materials used in all three provinces can be regarded as being congruent with the main principles and framework of White Paper 6. The strength of the material lies in the way in which they address the principles and philosophy of the White Paper. They all clearly attempt to shift the attitudes of the target audiences towards understanding the concept of barriers to learning and a systemic framework for change.

With regard to training people in the specific roles and functions that are expected from them in the White Paper (e.g. the roles and functions of the DST), it is felt that some materials do this extremely well. Others, however, do not provide enough information and guidance in this area. It is also felt that although most of the terminology used in the materials is congruent with White Paper 6, there are instances where this could be improved. In materials such as these the words that are used and the 'voices' that are emphasised are extremely important in shifting attitudes and building awareness.

Relevance:

The findings of the materials assessor indicate that most of the materials are relevant to the realities of the local contexts and these issues have been carefully considered. In many of the materials the use of innovative case studies and examples demonstrate a real attempt to make them relevant for the target audience. Two 'gaps' appear to stand out as areas that could be improved across all three provinces. Firstly, the range of barriers considered in the materials could be expanded and their impact addressed in more depth. Secondly, not enough attention has been given to both parents and learners as key target groups in the capacity building process. Although some useful material has been developed for parents, especially in their capacity as members of the SGB, it is suggested that capacity-building activities among learners should be seen as essential for overcoming prejudice and building respect.

Accessibility:

All the materials looked at by the assessor are regarded as being relatively accessible to the participants of the capacity building programmes. Particular mention is made of some of the materials where techniques such as visuals, relevant examples, case studies and creative layout improve their overall accessibility. In most of the materials the language used is felt to be accessible for the target audiences, however, there is also room for improvement across all three provinces in this area.

12. CONCLUSION

The national overview of the project shows that in all three provinces the pilot projects have had a very positive impact on the policy implementation process. In particular, there have been significant gains for the teachers who have been involved in the project. There is evidence of this from the responses received from teachers in the questionnaires and in the examples given and statements made about what they have learnt and gained through the project. This strength points to the commitment and valuable expertise that been brought into the project by the project co-ordinators, members of the three consortia (universities and NGOs) and many of the members of the PMTs and PSTs. Much of what has 'worked' in the project shows a high level of quality in the 'inputs' made and 'outputs' developed through the project.

While the project has been extremely valuable for teachers, as we move away from the schooling level, towards the district and provincial level the impact of the project seems to become less significant. Many of the challenges that exist are about providing schools with the support that they need to sustain what has been started through the project, facilitating the effective management of inclusive education at the district and provincial level, and using the learnings from these pilot projects to contribute to the ongoing implementation of White Paper 6. The challenges show that inclusive education has to be addressed from that 'systemic' perspective where all levels and aspects of the system, including all the role players, are involved in its development. The 'learnings', 'indicators', and recommendations discussed in the next three chapters are addressed from this systemic perspective.

CHAPTER SIX

LEARNING FROM 'GOOD PRACTICE'

1. INTRODUCTION

The purpose of this chapter is to highlight 'what has worked' in the inclusive education pilot project. This chapter shares some 'success stories' to support the further development of inclusive education in the three pilot provinces and in other provinces and countries. The success stories in this chapter have been drawn from the findings of the evaluation, and from practical experiences in the pilot project. They provide 'snapshots' of aspects of the implementation of inclusive education that, in the eyes of the participants, "*have worked*".

The examples of success identified through this evaluation are presented under the following 'levels' of implementation:

- In the classroom
- In the school
- School-community partnerships
- Educator development and capacity building
- District support
- District, provincial and national leadership and management

Under each of these sections a number of areas have been highlighted. These areas have emerged from the three pilot provinces, but they also link directly with what would be considered to be key areas of indicators for inclusive education (for details on this, see Chapter Seven of this report).

After each set of examples, the most important 'learnings' from these 'good practices' are summarised in the form of practical guidelines. These are presented in 'boxes' for easy reading. It is hoped that these guidelines will help others in this country and beyond to build on the very important and valuable experiences of the three pilot districts.

It should be noted that the Department of Education has committed itself to developing this chapter into an accessible, 'easy-read' booklet that can be distributed widely within the country and in the Southern African Development Community (SADC) countries. The booklet will build on the examples provided in this chapter to 'inspire' all concerned to engage actively with the challenges of building an inclusive education and training system in Southern Africa!

2. IN THE CLASSROOM

2.1 The Educator as Reflective Practitioner

Many teachers in this evaluation said that *“the action research process has been a useful strategy for helping teachers to implement inclusive education in their classrooms. Particularly valuable has been the action/reflection cycle that equips teachers to become more ‘reflective practitioners’. This model of operation is now happening in many of the pilot schools.”*

Action research is an approach to self-improvement and professional development that is used by many teachers and other professions. It includes:

- reflecting on one’s practice to identify areas needing improvement or changes;
- setting goals to bring about change;
- planning to achieve these goals;
- taking some kind of action to achieve the goals;
- observing the effects of the action to identify the extent to which it has ‘worked’ or not. This observation can be done by the teacher, by other teachers, by the learners, or by an outside facilitator.

That completes the cycle, and begins the next one: reflection → planning → action → observation. and then it starts again with reflection. This is what the Norms and Standards for Educators calls becoming a ‘reflective practitioner’. Being a reflective practitioner means that teachers are committed to ongoing learning by consciously and regularly reflecting on their own practice. This is one of the seven roles required of teachers in South African schools.

It is clear that in the three pilot projects, this was achieved in a very successful way. It was the main strategy used to help teachers to learn to identify and address barriers to learning in their classrooms and schools. It was also a key strategy used in this pilot project to implement White Paper 6.

2.2 Identifying and Addressing Barriers to Learning

2.2.1 Developing awareness and capacity to deal with barriers to learning

Within the framework of inclusive education, the key challenge is to promote the inclusion of all learners by identifying and addressing barriers to learning that exclude learners from effective teaching and learning. A major thrust of the three pilot projects was to help teachers, and other role players, to understand what these barriers to learning are. This involved identifying barriers at all levels of the system, and learning to find ways of overcoming them. The findings of the evaluation clearly show that this was achieved: *“Teachers became aware of the barriers to learning that result in exclusion of learners, and were equipped to overcome the discrimination and exclusion experienced by some learners in the past, especially learners with disabilities.”*

One teacher said: *“As a grade 1 educator I used to go home stressed by learners who are slow, but now I enjoy working with them.”* This quote highlights an important

point: teachers are *already* faced with diverse learning needs in their classrooms. In the past teachers did not receive the training and support they needed to know how to respond to these needs. Now, the implementation of the policy on inclusive education provides some answers to questions that teachers have been struggling with for a long time.

2.2.2 Addressing psychosocial barriers to learning

Some respondents in the evaluation said that it is *not* the role of teachers or the Department of Education to deal with 'welfare issues'. They felt that the Department of Welfare should take care of these issues. However, teachers involved in the pilot projects very clearly indicated that they are facing the challenge of these psychosocial issues in their classrooms. Psychosocial issues do interfere with teaching and learning. Therefore, dealing with them does become a central responsibility of the school and teachers to try to address these barriers. Teachers involved in the pilot project indicated that the project helped them *"to address some psychosocial barriers to learning, in particular, abuse, and the effects of HIV/AIDS."* They also said that: *"the project has enabled teachers to more clearly make the link between barriers to learning and contextual factors such as poverty and HIV/AIDS."*

Whether we like it or not, schools in South Africa are faced with having to deal with psychosocial issues. This is because schools are part of a larger social system that affects them directly or indirectly. Children and youth spend a large part of their lives in schools and in this way their families are linked to their schools. For these reasons, schools are important places to try to address these issues. Schools that do address these issues will play an important role in the development of the wider community and country. This is why the World Health Organisation (WHO) has placed such an emphasis on the development of 'health promoting schools' (for details, see Section 4.4 below).

2.3 Inclusion of Learners with Disabilities and Youth Out of School

With regard to including learners with disabilities in the pilot schools, many said that *"teachers were taught to include learners with disabilities in their schools and classrooms."* And some said that *"learners with disabilities have been included in some of the schools and ... these schools were made physically accessible as a result."*

It should be noted, however, that only a few learners with disabilities were brought into the pilot schools as a result of this project, and that *"severely disabled learners have not been included in mainstream schools. So far schools have only had to deal with a very limited number of learners with disabilities. The challenge will be there when they have to address the needs of learners with severe disabilities."*

The challenges of inclusive education have therefore only begun. However, there is already evidence of success where the inclusion of learners with disabilities has happened in some schools. One of the major 'successes' has been the change of attitudes that happens when teachers, learners and schools are faced with 'the reality' of actually including learners with disabilities in their classes. This has helped

them to get through their fears of the unknown, and to learn to respect one another. This can only happen, however, if teachers and other members of the school community are aware of and learn to respect the rights of others. It is also necessary for them to understand how to respond to different kinds of learning needs in the classroom and school.

Many of the people involved in the project also said how important how important community organisations were, especially Disabled Peoples' Organisations (DPOs) and organisations of parents of disabled children, in helping to identify children in the community who were not attending school. These organisations also played a very important role in educating parents about the rights of their children.

2.4 Integrating Outcomes Based Education (OBE) and Inclusive Education

“Teachers learnt how to integrate the goals and strategies of inclusion in all aspects of the curriculum – in their classroom practices. This included what to teach, how to teach, how to assess learners, and how to manage the classroom – in order to include all learners.” In particular, *“teachers emphasised ... how issues such as teaching styles and pace can be used to facilitate the involvement of all learners.* Another positive learning for many teachers was the value of group learning and peer support in helping all learners to learn. They were also helped with assessment techniques, including setting specific goals for individual learners, to facilitate inclusive education. *“In this way their understanding of the child-centred approach has been enhanced because they have learnt to view each child as ‘unique’.”*

The above quotes show that the teachers in the pilot schools have understood the connection between inclusive education and OBE. This is clear because the words and phrases they are using, and the aspects of curriculum that they are referring to, are central to the OBE framework. They are also central to the principles of inclusive education.

2.5 Classroom Management

One of the key challenges in developing inclusive education is to develop *respect* for oneself and for others. This means accepting that, while we are all the same as humans, we are all different too. We come from diverse backgrounds and have different ways of looking at and engaging in the world. The challenge is seeing and accepting this ‘diversity’ of people as a strength, rather than as a negative aspect of social life. When differences about race, gender, language, ability, and sexual preference are not accepted in society, discrimination happens. The central challenge of inclusive education is to address any and all forms of discrimination that relate to the ways people learn in the classroom and in schools.

The findings of this evaluation show that *“teachers have learnt to manage the classroom with a view to accepting all learners. The teachers’ own attitudes and responses to learners have changed. They have learnt to respect differences and to provide opportunities for learners to work at different paces to accommodate their different learning needs. Teachers are more aware of the need to provide equal opportunities for learners in their classrooms.”*

2.6 And So ...

- Action research is a very valuable strategy for helping teachers to improve or change their classroom practices to integrate the principles and practices of inclusive education. It should be built into ongoing staff development programmes.
- Understanding the barriers to learning that interfere with successful learning helps teachers to 'teach better'. It also helps them to prevent the exclusion of learners wherever possible. It is important to show teachers how the barriers to learning link directly with the process of teaching and learning so that they understand that addressing these barriers is central to being a good teacher.
- Whether teachers like it or not, they are being forced to address psychosocial barriers to learning such as poverty, substance abuse, violence, and HIV/AIDS in their classrooms. These barriers interfere with the teaching and learning process. It is important, therefore, to give teachers guidance on how to address these challenges in their classrooms, and how to get help from the Institutional-Level Support Team (IST) and District Support Team (DST) when necessary.
- The challenge of addressing the needs of learners with disabilities in 'mainstream' schools will be more easily addressed when teachers are faced with actually having these learners in their classes. This will enable them to confront their fears and discover that they can include them in their classrooms. In other words, we don't need to wait until 'the teachers or the school are ready' before we include learners with disabilities in their classes. Teachers will be able to respond to the full range of learning needs in their classrooms if they are given the chance and the necessary support to do so.
- Other government departments and community organisations (Non-Governmental Organisations (NGOs) and DPOs) can help to find and bring the 'youth out of school' and the children and youth with disabilities into our schools. For this reason, it is important to find ways to work together with these institutions and organisations to achieve this.
- It is important to help teachers to understand the link between inclusive education and outcomes-based education (OBE), and that OBE is based on an inclusive framework. This will help to reduce feelings of 'policy overload', and promote the practical implementation of OBE.
- Teachers have a central role in addressing negative attitudes towards those who are 'different' in their classrooms. This is particularly the case with regard to people with disabilities. They can do this in two main ways: by modeling respect for diversity in their own behaviour in the classroom, and by facilitating respect between learners.

3. IN THE SCHOOL

3.1 Principals as Champions: The Role of Leadership in Implementing Inclusive Education

“The principal is important in the effective implementation of inclusive education in the schools. Where the principal had been supportive, s/he had acted as a ‘champion’ which had a very positive effect on the teachers, the parents and other role players.”

This quote highlights one of the key findings in this evaluation. Principals can ‘make or break’ the successful implementation of inclusive education in our schools. It is important, therefore, to ensure that all principals understand the policy of inclusive education and what this means for their schools. It is also important that principals ‘role model’ a commitment to building their schools into inclusive teaching and learning sites.

3.2 The Role of the Institutional-Level Support Team (IST) in Making Inclusive Education Work

“The establishment of ISTs in the schools has been very positive and most are up and running and working well. The training has been a good grounding for them.”

The following points were made about ways in which the ISTs have been successful in providing support within schools.

“ISTs have helped to link the school with the district support available.”

“The ISTs have provided an opportunity for teachers to provide support to one another and they receive training. The ISTs enable the teachers to discuss particular barriers that learners in their classes are experiencing and provide an important structure for peer review to take place.” For example, *“the IST is helping teachers to set learning goals for all the learners in their classrooms according to their capabilities.”*

“ISTs also help through the dissemination of information or direct help in the classroom.”

It is clear from the above that ISTs can and do help teachers to address the many barriers to learning in their classrooms and schools. The way in which it has been done in the pilot schools is important to note. The focus is on teachers solving problems collectively among themselves. They only need to bring in other support providers from the DST when they cannot find a way to solve a problem themselves. And from this evaluation, it seems that some of the ISTs do know how to link with those service providers when necessary.

3.3 Learning to Work Together

One of the 'spin-offs' of the implementation of inclusive education in the schools has been that it *"has helped to develop more collaborative work in the school. The teachers discovered the importance of working together in teams, and have learnt to do this better."*

This is an important 'spin-off' as it contributes to the development of a 'collegial' approach to teaching and management in schools. Given the commitment to democracy and 'working together' in this country, this is an important part of implementing inclusive education.

3.4 The Role of School Governing Bodies (SGBs) in Building Inclusive Schools

"The attitudes of members of the SGB have changed through the capacity building that has occurred, and they are now developing inclusive school policies, are aware that they need to make their schools more accessible, and are involved in poverty alleviation projects."

Many of the SGBs in the pilot schools were helped to understand how to integrate the policy of inclusive education into the governance of their schools. The SGB capacity building workshops helped in this regard. However, the evaluation has revealed that more attention needs to be given to supporting SGBs. In particular, inclusion of the parents or caregivers has not always received the full attention it deserves and needs. Practical strategies need to be developed to involve parents/care-givers more fully in the governance of schools. This includes developing a genuine respect for parents and care-givers as partners, and making sure that parents can understand all forms of communication between the school and parents.

3.5 Making the School Accessible

"Many of the schools have become more accessible to learners with physical disabilities."

An example of how this has happened in one province is outlined below. *"Physical Planning has been centrally involved in this project, helping schools to become physically more accessible. They have been involved in various renovation/refurbishment projects in the schools. The pilot project helped the person in charge of this in the region to become aware of what is needed to promote inclusive education. He has learnt a lot about the needs of learners with disabilities through this process. For example, he saw the need to integrate the toilet facilities so that learners with disabilities don't feel excluded, and so he tried to organise for integrated toilet facilities to be built where possible. He has also been able to turn shacks into new buildings with accessible facilities. This process has made it possible for this person to make direct contact with the schools which he says is very important because forms don't present needs and conditions well!"*

This is a very important 'success' story. It shows how 'a lot' can be achieved through 'a little'. Even though there is very little funding available for building and renovating school buildings and grounds so that they are accessible, so much has been achieved in some of these schools! However, a lot of work still needs to be done to make sure that the resources needed to do this properly throughout the country over the next twenty years are found. A combination of state budgets, private and donor funding, and community involvement needs to be pursued to 'make this work'.

3.6 And so ...

- The principal, as leader in the school, has an important role to play in developing an inclusive school. It is important to ensure that s/he is provided with the necessary capacity building to do this task, and is then involved and committed (for all to see) to developing her/his school into a place of teaching and learning that includes all members of the school community.
- ISTs have a central role to play in providing direct support to teachers so that they can address barriers to learning in their classrooms and in the school as a whole. It is important to support schools to set up these teams, and to help them to make them work.
- The collaborative problem-solving approach used in the ISTs is very successful in finding solutions to problems. It helps teachers to work together as teams to solve common problems. This way of working to address barriers to learning should be supported through training and, where necessary, DST support.
- Through training and ongoing support, SGBs should be assisted to (a) understand the key challenges to them from White Paper 6, and then (b) develop their own school policies and governance policies in line with this.
- It is possible to develop schools that are accessible to people with physical disabilities, even with limited resources. To achieve this, however, it is important that (a) education officials in charge of physical planning understand the challenges of inclusive education, and include this aspect in their central planning and projects; (b) community groups and people are brought in to help to make schools safe and accessible; (c) that sufficient funds are allocated to this in the provincial budgets; (d) accessibility issues are integrated into general physical planning and development of schools.

4. SCHOOL-COMMUNITY PARTNERSHIPS

4.1 Parents are Partners

“The critical role of parents and the importance of strategies to involve parents more in their child’s learning was reinforced through the project and collaboration with parents intensified as a result.”

Successful projects including parents were developed. Parents have been involved in the development of vegetable gardens and in the training/capacity building programmes themselves (e.g. parents of children with disabilities have helped to raise awareness of the rights of these children to quality education).”

Despite these positive experiences, the findings of this evaluation also revealed that not enough attention has been given to how parents can become more involved in the life of the school. But, *“the schools have realised that talking to parents is a really critical issue and that this doesn’t get enough attention.”*

4.2 Identifying Community Resources to Address Barriers to Learning

The research in the three pilot districts included what are sometimes called ‘asset-audits’ or ‘community-resource profiling’ processes. These are ways of identifying the human resources (people, groups, organisations) in and around the school that can help the school to address the barriers to teaching and learning that they experience. This information was then converted into a school, or district, ‘resource file’ that provides information to help schools to link with these people or groups when necessary. An example of how this was done in one of the districts is a resource file that *“the school health nurses and education support services personnel drew up to identify the human resources available to provide support.”*

4.3 Building School-Community Relationships

The general view of those involved in the three pilot projects is that *“very positive community-school partnerships were developed through this process. Inclusive education initiatives have led to improved relationships between the pilot schools and their surrounding communities.”*

4.3.1 The important role of DPOs

NGOs and DPOs have played a central role in the training and development of inclusive education in the schools. In particular, *“the involvement of the DPOs ... and people with disabilities in leadership positions in the project ... helped to change attitudes towards people with disabilities. Seeing people with disabilities and parents involved in training and such activities has a major impact on people. They tend to confront their own negative attitudes and fears with very positive outcomes, and, through the involvement of DPOs, disabled people and parents become ‘un-hidden’ in the communities”.*

4.3.2 Involvement of community leaders

Involvement of community leaders and members in initiatives to develop inclusive schools has been highlighted as important in these pilot projects. *“The closer involvement of the community in the school through the project was seen as very beneficial, especially the drawing in of natural leaders from the community. This has included chiefs and ward counselors.”*

“Members of the community have been drawn in to help schools to address many basic needs such as making buildings safe and secure. The community fixed the school’s windows, putting the panes in. This makes the community ‘own’ the school and prevent vandalism. It also has had the effect of challenging other communities.”

4.3.3 The role of a health worker

In one district, *“the Community-Based Rehabilitation (CBR) Facilitator, employed by the special school/resource centre in the area, played a very important role in developing positive community-school relationships in the area. She has been working with parents: raising their awareness through drama (through an NGO called Drama-Aid); she has worked with learners with disabilities in their homes; she has developed parent support groups (five in total) which have formed into day-care centers where the mothers are involved in teaching their children (basic skills are shared in these centers and this provides training for the parents); and she helps to get learners with disabilities into the special school/resource centre and mainstream schools – working closely with NGOs and DPOs to do all of this.”*

This case study shows the important role health workers can play in helping to build inclusive schools. It also shows how parents and others directly and indirectly linked to the schools can benefit from these kinds of initiatives. It should be noted, however, that external donor funds from the special school/resource centre in this pilot district were used to pay this health worker. Her continued work with this school and in this community is dependent on the Departments of Education and Health finding a way of prioritising and supporting such a partnership with resources. This is true for the involvement of health workers in education generally as well. The health promoting schools strategy, which has been accepted as an important framework for working together in this country, is a way of pursuing this.

4.4 The Health Promoting School Strategy Works!

“The Health and Education Departments have collaborated successfully through their joint projects in the ‘health promoting schools’ strategy, addressing various ‘health’ barriers to learning (physical, psychological and social aspects).” Through this strategy the nurses have learnt a lot about the education support system ... and primary health care in the schools has improved through, for example, the provision of first-aid kits and training in the pilot schools. Schools are being developed as health promoting schools.”

The evaluation revealed that the health promoting schools strategy is being used as a central mechanism to bring the Departments of Health and Education (and sometimes other government departments) together in these pilot districts. This

strategy is based on the Ottawa Charter on Health Promotion (WHO, 1986) and emphasises five areas of action:

- building school policies that promote the well-being of all members of the school community
- developing a supportive and safe teaching and learning environment
- building strong school-community relationships
- developing personal skills (life skills for learners, teachers and parents are relevant here)
- developing accessible and relevant education support services

In addition to the direct benefit within the school, the health promoting schools strategy has shown that it is very successful in developing strong school-community relationships. It draws on the strengths of the parents and the community to build effective schools, and, through the schools themselves, benefits the surrounding community.

4.5 And so ...

- Parents have a very important role to play in helping to build inclusive schools. The challenge is in expanding the ideas of how parents can be involved, and then learning to work with them as partners around various practical projects.
- Building good community-school relationships includes the ability to identify those community resources that are in and around the school that could be used to address barriers to learning. Schools and district teams need to be assisted to conduct 'asset-audits' or 'community-resource profiling' processes to help them to do this. From this, schools and districts can develop Resource Files that capture the names and contact details of those who can help them to address the many challenges in their school.
- NGOs can play a very important role in helping schools to address barriers to learning. Mechanisms need to be found to draw in relevant organisations, in coordinated ways, to help the ISTs and DSTs.
- Including DPOs and people with disabilities to help with the training and support to schools and DSTs, has a major impact on the development of positive attitudes towards 'diversity and people with disabilities. It is important, therefore, to ensure that they are involved in various ways, including providing leadership to inclusive education initiatives in schools and at district level.
- It is important and invaluable to include community leaders in initiatives to build inclusive schools, and surrounding communities. Efforts should be made to include them in this way.

- Community health workers can help schools to develop strong school-community relationships. This contributes towards addressing various psychosocial barriers to learning in the schools. It is important, that the Departments of Health and Education look at concrete, practical ways to make this possible.
- The health promoting school is a very successful strategy for providing the common 'space' to do the above. It should be promoted at all levels in the Departments of Health and Education. It has also proved to be one of the most successful strategies for developing strong community-school relationships.

5. EDUCATOR DEVELOPMENT AND CAPACITY BUILDING

5.1 Successful Educator Development Strategies

5.1.1 Training helps!

“All the role players identified the training programmes or workshops as very important and positive aspects of the project. Positive effects that were raised include attitudinal change, new and improved levels of skill among teachers, information about the new policy, and the value of strategies such as collaborative working and ‘getting help’.”

Local and international experience has shown that the implementation of policies or other educational change initiatives need to make sure that the role players in the system support the policy and recognise the need for change. Training and capacity building of role players around the new policies and changes is very important to develop such support. For this reason, one of the key strategies used in this pilot project has been educator development. The evaluation reveals that this strategy has worked very well! However, the way in which this strategy is developed is important. The points below highlight how this was done successfully in the three pilot districts.

5.1.2 The ‘training and support’ approach

“The school-based support and action research processes provide the basis for an excellent model of participatory, interactive facilitation and learning processes”

In this pilot project a combination of workshops with teachers and action research in their classrooms was used. It was this combination of these two approaches that seems to have been a strength of the project. There is evidence elsewhere in South Africa to show that training workshops on their own have very little impact. Some form of follow up support after training is important as it allows learnings from workshops to be integrated into classroom and school-based practice. Action research, as a strategy, is ideal for this.

5.1.3 The school-based approach

“The school-based approach to training, where the workshops were integrated into the staff development programmes in the school, was successful. When teachers are pulled out for training, it doesn’t seem to be as successful. School based training has been extremely effective because it allows for issues around inclusive education and developing inclusive practices to be integrated into general initiatives around staff development within schools. Such training has been most effective where the principal is centrally involved in the process, and the involvement of the ISTs in this process was particularly important.”

It seems that where a school-based approach to training was pursued in the pilot project, this was very successful. Integrating the training into existing staff development programmes has the benefit of (a) avoiding uncoordinated ‘overload’ that many teachers, in and outside of this project, have complained about, and (b) promoting staff development programmes in schools.

5.1.4 University and community organisation participation

“All role players said that the consortium (universities and NGOs) had played a very positive role in the project. This included the members involved in the training as well as the researchers and the ongoing support that they were able to offer to the teachers and schools.”

The community partnership model that was pursued in this project is in line with developments across the country, and in other countries. It involved bringing together universities, community organisations and the Department of Education to provide opportunities for training, research and community service. This example highlights that the consortiums that were developed around this model played a very important role in the project. They developed relevant training and capacity building programmes and materials for educators and other role players. They also supported the implementation process through ongoing action research in the schools and the district as a whole.

Although the consortiums played a very important role in the project, the community partnership model also creates many challenges for the people and organisations who are involved. These challenges include an ongoing need to ensure that all members of the partnership respect each other and that the contribution of each partner is equally valued and recognised.

5.2 Making Training Materials Accessible and Relevant

5.2.1 Examples of ‘good practice’ texts

The material assessors for this project identified specific units in the modules that were successfully developed according to the criteria of the policy framework and accessibility and relevance to local needs. Two examples of these ‘good practices’ in the materials are presented below. The comments by the assessors show why they are ‘good’.

Example One:

"Unit 4 stands out as the most coherent, integrated, interactive and accessible Unit in the series. It also adopts a more appropriate approach to developing real understanding in that it incorporates a practical, hands-on, step-by-step approach to engaging with all of the content. It also includes good examples of how icebreakers can be properly integrated with and related to the content in meaningful ways. Similarly, the core concepts are approached more meaningfully than in other Units, and are supported by means of a glossary that explains their meanings. The unit also demonstrates an OBE approach and good practice without using OBE jargon unnecessarily."

Example Two:

"All three modules include combinations of a range of engaging higher-order activities that provide opportunities to develop real conceptual understanding. These include, among others: group and individual activities such as responding to controversial statements; reading and discussing information and giving opinions; brainstorming; completing tables; categorising; reflecting on models and case studies; making comparisons; forming opinions; drawing conclusions; summarising; consolidating; critical self-reflection and applying new understandings to relevant practical situations."

These examples highlight the importance of using relevant teaching strategies that not only address the needs of the participants, but also take them from 'where they are' to new levels of understanding and knowledge.

In addition to the above examples of units that, as a whole, can act as 'good practices' to guide further materials development, the following comments were made about specific aspects of materials development.

5.2.2 Congruence with the OBE framework

With regard to the extent to which the material is 'in line' with, and integrated into, an OBE framework, *"specific mention is made by an assessor of one Unit in which the material on language and literacy is well located within an OBE framework and the methods and approaches used make relevant links to inclusive education."*

In another example, an assessor said that *"this programme and material reflects, in fact it models, the OBE approach in various ways. It is learner-centred; it is inclusive in its approach (drawing from the educators' own experiences); it supports an active approach to learning, and provides a variety of activities to keep learners engaged; it does this in an interactive and participatory way, building in reflective practice throughout, and providing opportunities for problem-solving through activities such as case studies."*

5.2.3 Relevance

"The materials are relevant to the needs of the target audience. This is revealed particularly through the approach used in the workshops themselves, where the educators' own background of knowledge and experiences are drawn upon, and

through connections directly made with the expressed needs of the educators concerned. The case studies that are used also make these connections.”

“The material was helpful to teachers when they wanted to know what to do to address a particular barrier to learning in their classroom (they used it as a practical reference point).”

5.2.4 Accessibility

All three materials assessors involved in this evaluation felt that *“there are some very good examples of a coherent, integrated, interactive and accessible approach.”*

It is important to note, however, that they all also said that there is a need to further develop these materials into ‘easy read’ language (where more accessible every-day English can be used and sentences made more simple without compromising the meanings of the text). This is necessary to ensure that all educators (particularly the majority who are not English first-language speakers) and other role players (including parents/care-givers) can engage with them meaningfully. Developing ‘easy read’ versions of the materials will mean involving people who know what the needs are in this regard, as well as experts who have developed the materials development skills needed to ensure accessibility.

5.2.5 The relationship between theory and practice

“A central issue in the development of these programmes and materials is the extent to which, and the way in which, theory and practice are linked. In this module, both aspects are taken seriously, creating a ‘hybrid approach’.”

The assessment of the materials developed for this project reveal a serious attempt to try to provide a sound theoretical background together with practical guidelines to the various challenges of inclusive education. Finding a meaningful and accessible way of engaging with theory and practice at the same time is not easy! Although a ‘hybrid’ approach, which tries to take both aspects seriously, is a step in the right direction, it can also be unnecessarily complex and confusing. Strategies need to be developed to ensure that the relationship between theory and practice is usefully and meaningfully developed.

Two learning theories that can help in this regard are ‘mediated learning theories’ (drawing from learning theorists such as Vygotsky and Piaget) and ‘experiential learning’ (the dominant approach used in adult education). These two approaches both emphasise the need to identify and understand ‘where the learner is’, and then take them, in a supportive way, to ‘where they need to be’. Experiential learning emphasises the role of ‘reflection on action’, and linking new learnings with the needs and realistic experiences of the learner. Mediated learning emphasises the need to provide ‘scaffolding’ or (meaningful support to learners as you take them from ‘where they are to where they need to be’.

5.3 Capacity-Building of Education Officials, District Support Teams and Other Role Players

“The programmes and materials assessed reveal some creative approaches to facilitating capacity building of the role players concerned.”

In general, the materials assessor focusing on these materials said that *“the materials included examples and case studies that are relevant to the realities of the local context. The teaching strategies used in this programme are creative and practical. In particular, the use of drama, demonstrations and questioning are particularly successful. In addition, a very useful step-by-step guide on how to develop inclusive school policies is provided.”* In addition to the teaching methodology and local relevance of the materials, the assessor also noted that *“the language used in the materials is relatively simple and is therefore likely to be accessible to the role players concerned.”*

5.4 And so ...

- Training of educators and capacity building of ISTs, SGBs, DSTs, as well as relevant members of the Department of Education at other levels, is an essential ingredient for successful implementation of the inclusive education policy. Human and material resources therefore need to be allocated to this important strategy for ‘change’.
- The model of training and capacity building that has proved to be successful in these pilot projects is ‘training and support’ within an integrated school-based approach. This has taken the form of workshops and classroom/school action research that are built into the school’s staff development programmes. Training and capacity building programmes developed by the Department of Education need to provide programmes that include these ingredients.
- Central to successful training and capacity building is the challenge of integrating inclusive education into the Department’s OBE training and support programmes. This means that at district level and other levels of education management, integrated planning and programmes need to be developed in this regard.
- The consortiums (including universities and community organisations) that supported the pilot projects played a very valuable role in the development of the training and capacity building programmes. The Department of Education needs to look at ways in which it can build partnerships with these sectors to address the massive educator development and capacity building needs in the country.
- Capacity building programmes were developed for ISTs, SGBs, DSTs, and, in some instances, members of the community. It has been suggested that programmes focused particularly on parents also need to be developed. In addition, programmes for learners need to be developed in order to build their capacity to support and teach one another within a ‘peer-support’ framework.

- The DSTs have a crucial role to play in supporting schools to address barriers to learning in their contexts. Most of education and other government department officials do not feel equipped to fulfill the roles and functions expected of them. Capacity building programmes need to be further developed and delivered at this level. In addition, clear guidelines for the roles and functions of these teams need to be developed as a matter of urgency.
- Educators, support personnel and other relevant role players find it useful to have materials to refer to in the process of developing their practices so that they can build an inclusive education and training system. This material does, however, need to be relevant and accessible to all the role players. This means drawing on and responding to local needs and issues; making sure materials are in line with the framework for inclusive education as outlined in White Paper 6, directly linked with the OBE framework; and making sure that 'easy read' language makes the materials readable and accessible to all role players.
- Learning theories such as those that focus on mediating learning, and experiential learning, need to be more fully explored and integrated to provide a strategy for capacity building programmes. This means paying serious attention to taking educators and others "*from where they really are, to where they need to be*".

6. DISTRICT SUPPORT

6.1 The Role of Special Schools/Resource Centres

"The workshops have helped the special school/resource centre to understand its role in supporting inclusive education in the district. The staff have enjoyed the training that they have received and are trying to meet the challenges of developing a new role for themselves." The schools seem to realise that they have "*a key role to play in giving support to teachers in schools.*"

The pilot projects in the three districts do seem to have had some success in assisting the special schools/resource centres in understanding their role as inclusive education resource centres, as proposed in White Paper 6. It should be noted, however, that this is an area of challenge that still has a long way to go, in the pilot projects and beyond. As a principal of one of these schools says: "*There is a need for more capacity building. In particular, there is a need for whole school development with this school.*" All the principals involved in the three pilot districts also highlighted that there was "*a shortage of staff. There is not enough time for teaching and support.*" They clearly do not at the moment see how it is possible, with existing staff allocations, to respond to both of these challenges. These concerns and needs in the special school/resource centres need to be addressed if inclusive education is to be successfully implemented.

6.2 Working Together Within the Department of Education

“Intra-departmental (within Education) collaboration has improved. One example of this collaboration has been around physical planning, where the inclusion of the key person in charge of this area in the province has resulted in the development of physically accessible schools in this district, and has made this section of the Department more aware of the challenges of building inclusive teaching and learning environments.”

The above quote highlights one particular area of success in creating an opportunity for education officials from the different directorates to work together to implement inclusive education. While this example does show that there has been a move towards a more integrated and coordinated approach to developing support for schools, the evaluation also revealed that this was not easy and that a lot of work still needs to be done to make this work. First, all directorates in the Department need to see how inclusive education is their business: *“Inclusive education is still seen as something separate, the responsibility of ‘auxiliary’ personnel only.”*

Then attempts need to be made to integrate planning and interventions. This involves bringing in all of the expertise available in the Department around the challenges facing the schools. This needs to be managed well so that it is coordinated, and provides opportunities for teamwork in addressing the needs and barriers identified. To do this, human and other resources need to be made available for this work. This does however, include better use of existing personnel and other resources in the Department.

6.3 Working Together with Other Government Departments

“Intersectoral collaboration – across government departments – has been successful.”

“At district level there were positive experiences of working together to address various barriers to learning. This has been particularly true for the Departments of Correctional Services, Health and Welfare.”

Besides the collaboration between the Departments of Health and Education (which have been described in examples in previous sections in this chapter), another example of how the Department of Education has worked successfully with another government department is outlined below.

“The Department of Correctional Services is encouraging prevention of crime, and so are involved in various outreach programmes to combat crime. Various projects with the Department of Education are supported because the Provincial Commissioner says that they should be involved in supporting schools. One of the strategies this Department is using at the moment is to analyse where schools are taking in learners who have been in prison, and then they target their support to those schools. They have also tried to address security issues. Another example of where they have intervened is around an ‘awaiting-trial’ student who was allowed to write exams and he was so grateful that he thanked the authorities concerned and is intending to further his studies.”

These examples of successful collaboration between the Department of Education and other Departments are important to learn from. This includes being aware that working ‘across line functions’ in and outside of the Department is not easy, but it is very rewarding for all concerned. Some of the ‘not easy’ parts relate to problems that have been identified in this evaluation. This includes that *“not all stakeholders attend meetings”*; *“there is no sharing of responsibility”*; and *“uncertainty about responsibilities means that it falls between stools.”* These are some of the nationally and internationally recognised challenges to those who wish to and need to work together to provide integrated and comprehensive support to schools.

6.4 And so ...

- If special school/resource centres are to play the important role of acting as a resource centres for neighbouring schools, they need support. This support needs to be in the form of (a) training and ongoing support (within the ‘training and support’ model outlined above); (b) enough posts to meet the challenges of teaching some learners with disabilities in their own institution *and* supporting ‘mainstream’ schools; and (c) infrastructural support, including, for example, transport to facilitate the ‘support’ role to ‘mainstream’ schools.
- As mentioned above, district education officials and the intersectoral DSTs need to receive capacity building to fulfill their roles in supporting schools.
- In order to provide integrated, holistic and well coordinated support to schools, the education officials (at all levels) and DSTs need to develop (a) relevant structures to facilitate ‘working together’, and (b) integrated strategic planning processes and programmes.
- The evidence from the three pilot projects is that the Department of Education *has* to work with other government departments if it is going to successfully address the many psychosocial barriers to learning experienced in schools in South Africa. Concrete, practical strategies to support ‘working together’ need to be identified and pursued. Because of the education focus, the Department of Education will need to take the ‘lead’. Included in these concrete strategies is the need for the clarification of the roles and functions of all the role players concerned.

7. DISTRICT, PROVINCIAL AND NATIONAL LEADERSHIP AND MANAGEMENT

7.1 Implementing Policy

7.1.1 ‘Top-down’/‘bottom-up’ approach

“The approach used to implement policy in this project – a combination of ‘top-down’ policy guidelines and ‘bottom-up’ action research processes – was very successful.” In particular, *“action research, in the development of training materials, is a very effective strategy to support the implementation of inclusive education. It has a*

range of benefits, including bringing together a range of important players in the implementation of the policy.”

One of the materials assessor’s comments on the matter is particularly interesting. He says that *“these materials, and the processes they have resulted in, represent what may be the best example of an inclusive, democratic, participatory approach to bridging the gap between policy and implementation since 1994. They embody a serious attempt to disseminate vital information about new policies and their implications, and to translate policy into classroom practice through raising awareness about inclusive education, challenging beliefs, changing attitudes and developing new values and appropriate skills.”*

7.1.2 Building a new language and understanding of inclusive education in South Africa

“A non-jargoned discourse around inclusive education has been developed as most of the people involved had never been exposed to the ‘special needs’ discourse. The central involvement of very disadvantaged schools within very poor communities has contributed to the creation of this discourse.”

The ‘non-jargoned discourse’ that has been developed in the three pilot projects refers to a way of thinking and talking about inclusive education that uses the ‘language of the classroom’ to express what inclusive education is all about. So instead of using professional terminology developed by ‘special needs’ specialists, this pilot project has focused on finding the ‘educators’ language’ to explain their understanding of what they believe is expected of them from White Paper 6. In this evaluation, the ‘educators’ language’ has shown that they do understand the key challenges in this policy framework. The language they use when talking about the barriers to learning, and finding ways to overcome them so that all learners can learn, is directly linked with their ‘core purpose’, which is teaching and learning. The development of this non-jargoned language *“challenges the historical understandings around ‘special needs’ and the belief that you need specialised knowledge”* to address these challenges. The language that teachers in the pilot schools use to describe inclusive education also shows that they link inclusive education to human rights and making sure that all learners in the poor communities where they teach can attend school and participate in the classroom.

One of the respondents in the evaluation said that the reason this project has been so successful in the pilot schools and districts is because *“prior knowledge has not had to be undone.”* This poses a serious challenge to the professions that contribute to the development of this area in South Africa and beyond.

7.1.3 The ‘ripple’ effect

Many of the role players participating in this evaluation said that there has been a ‘ripple effect’ from this pilot project. They explained that the ‘good practices’ developed in the pilot schools and districts have influenced other schools and districts. How this has happened at different levels in the system is shown in the examples below.

In the School:

“This project, and the process of implementing inclusive education, had a generally positive ‘spin-off’ or ripple effect on the general development of the school.” This includes helping to develop a team spirit in the school, and helping many schools to deal with issues such as discipline.

In the Department:

“The ‘ripple effect’ of the implementation of inclusive education through this project has also been felt by other ‘levels of education’ in the Department, in particular, ECD and ABET. ECD and ABET have taken on board issues around the inclusion of learners previously excluded, especially disabled learners. For example, traditionally ABET and Special Needs never worked together. Through the involvement of an ABET person in the project, the official has been able to make contact with adults with disabilities who have not had access to ABET services in the past. Similarly, their increased awareness has enabled them to start being proactive in bringing adult disabled people from surrounding communities into existing ABET services.”

In the District:

“The changes in the pilot schools has a ripple effect on the other schools. This has been optimised by some of the pilot schools that have ‘mobilised’ for inclusive education in the area.”

7.2 Having Champions/Drivers to Promote Inclusive Education

The need for commitment from the ‘top’ to successfully implement this policy was highlighted by many people in this evaluation. This includes commitment from both the national and provincial levels.

“The visit of members of the National Directorate on Inclusive Education to the provincial office helped a lot to get people outside of the special needs area to recognise that this is an important issue for them as well. Since then, there has been more commitment and involvement from other people in the department.”

“Committed and sustained involvement of provincial education officials in this project has had a very positive effect. For example, it has helped the district to have a strong statement from the provincial office that all new buildings or renovations to buildings must be accessible.”

In addition to the need from ‘commitment from the top’, many highlighted the need for ‘champions’, or ‘drivers’, or dedicated post(s) and/or structures to ensure that inclusive education is taken seriously and integrated into central planning and programmes.

“The project has shown the importance of having a ‘champion’ or dedicated person(s) to drive the process of implementation. In particular, this has been shown through the project coordinator who has been a very positive force in the successful implementation of inclusive education in this district and province. Successful implementation requires a core group of committed people at district and provincial levels ... you need a critical mass for sustainability.”

7.3 Resources to Promote Inclusive Education

“All role players identified existing conditions in the schools as a major challenge for inclusive education. The issues identified include lack of physical resources in the school as well as the overcrowding in the classrooms. The impoverished conditions under which many of the learners live and learn contribute to a range of barriers identified.”

This is a reality that must be addressed in implementing inclusive education in South Africa. Some people feel that you cannot implement inclusive education when *“the basics are not there”*. This pilot project does suggest, however, that you can use inclusive education projects as a way of putting some of these basics in place!

A second important point relating to resources that was raised in this evaluation is the creative use of existing resources. One example of how this was done in one district was where *“existing human resources were optimised through the use of the College of Education lecturers to help with the training and the action research.”*

7.4 Changing Attitudes: Developing Respect for Diversity

“This project has had a ‘life impact’ on peoples’ attitudes. The attitudes of all the role players were changed positively as a result of the introduction to the new policy.”

These attitude changes have related mainly to the development of *“an awareness of the rights of children with disabilities to receive education.”* And, *“attitudes towards ‘differences’ became more positive, particularly in terms of attitudes towards people with disabilities.”*

This attitude change was facilitated in this pilot project through formal educational events like educator development and capacity building programmes. In addition, other strategies were used such as facing people with the reality of having to include learners with disabilities in their classes, and then giving them the support to develop positive attitudes to do this. In the same way, at district level, people with disabilities were included as leaders in the project, and different officials and professions were given opportunities to work together. This helped them to develop a common understanding and a common language to understand and respond to the challenge of providing support to the schools.

7.5 And so ...

- This project has shown that a combination of ‘top-down’ and ‘bottom-up’ strategies to policy implementation work. This means that the ‘push’ from the top needs to continue and be further developed – at national and provincial levels. It also means that the kind of educator development model that has been developed in this project (integrating a combination of workshops and ongoing action research support into the school-based staff development programme) needs to be pursued.

- The 'top-down push' can be concretised through ensuring that senior education officials in all directorates at national and provincial levels, are made aware of the importance of and challenges relating to White Paper 6. This needs to be done in such a way that they become committed to supporting implementation of this policy throughout their structures and processes.
- 'Champions', 'drivers', and dedicated posts and/or structures are necessary to ensure that this policy is implemented at all levels of the system.
- The school-based training and action research approach has proved to be very successful in implementing inclusive education in the three districts. Every effort should be made to look at how this approach can be continued and expanded throughout the country. This will need creative thinking given the time and human resource intensity involved in such a strategy.
- Teachers have managed to integrate the principles and challenges of inclusive education in their classroom practices because they have used their own language, emerging from their own experiences, to capture what 'inclusive education' is all about. This has meant that they have avoided using the contested 'special needs' language and categorisation processes. This is a very important learning for all concerned, including specialist support personnel who have been trained in traditional 'special needs' ways of framing problems and solutions. We need to build on this 'indigenous' way of implementing inclusive education in South Africa, making sure that all educators and support providers develop a common 'classroom' language that benefits the teaching and learning process for all.
- Many of the role players in this evaluation said that this project has had a 'ripple' effect – within the school, in the district, and beyond – where the positive experiences in the pilot schools have helped others to understand and start to respond to the challenges of inclusive education. This means that it is worthwhile to put resources into developing a 'critical mass' of people – at all levels – who can develop 'good practices' to share with others around them. If the choice is between allocating money to more schools and areas, but with very little support; or to give money to fewer schools and areas, with more intensive support – this project suggests that the latter is a better option. The challenge of going to scale over 20 years does, however, have to be planned for.
- Implementing inclusive education in South Africa needs resources! All possible strategies for getting intensive funding support over the next few years need to be pursued to ensure that there is enough money to pay for essential posts (especially 'drivers' of inclusive education at the different levels), and infrastructural support.
- It is important, however, to find creative ways to use existing resources. This includes using the people in the Department of Education in optimal ways. This is possible if more integrated planning takes place and programmes are developed, and if currently under-utilised staff are used to help with implementing this and other education policies (e.g. College Lecturers who do not have a college anymore!).

- A very strong finding from this evaluation is that, educators', district officials', and various support providers' attitudes changed positively through their exposure to White Paper 6 and the practical challenges of putting it into practice. Various 'communication' strategies need to be pursued to develop awareness amongst all relevant role players in the country. Similarly, we need to trust that attitudes will develop positively when all concerned are faced with the practical challenge of having to make it work, and are given the support to do this.

CHAPTER SEVEN

INDICATORS FOR INCLUSIVE EDUCATION

1. INTRODUCTION

A key objective of this evaluation process has been to draw out the lessons learnt from this pilot project and use them to inform and guide the ongoing implementation of White Paper 6. In the previous chapter the 'success stories' from practice were discussed. In this chapter the findings from the evaluation process have been used to develop 'indicators for inclusive education'. These indicators are those things (e.g. processes, structures, conditions and other mechanisms) that need to be in place or are in the process of being set up that promote the development of inclusive practices within the education system.

'Inclusion' is never a static outcome. It is an objective that is constantly being worked towards. This means that the emphasis should be on identifying the signs that indicate we are 'on the way' to achieving the implementation of inclusive education in South Africa. Some of these signs can be translated into concrete goals and/or 'benchmarks' that can be used to monitor and evaluate progress. These 'benchmarks' will, however, need to be located within a progressive implementation plan for White Paper 6 with a clear time frame.

The indicators presented in this chapter have been developed from the findings of both the first and second phases of this national quality evaluation. They have therefore been drawn from the action research processes that have taken place throughout the project in the three provinces as well as the data collected through the questionnaires and interviews conducted as part of this evaluation. The indicator development process has also been informed by some international literature on the subject¹ as well as by White Paper 6. It should be noted however, that the indicators presented in this chapter primarily reflect the findings from the pilot project. This means that they are most relevant to the schooling level and should be regarded as one contribution towards an ongoing process of development in this area.

The indicators are presented in the form of an instrument that could be used to help education institutions, District Support Teams (DSTs) and education officials at the national, provincial and district levels to evaluate the implementation process. Before the indicators are presented, the chapter outlines the six categories that best capture the challenges for inclusive education identified through the project. The categories create the framework for the instrument referred to above. The chapter also briefly describes the findings from the questionnaire process that reflects the perceptions of the teachers and principals about this issue.

¹ Refer Howell & Lazarus, for the Department of Education, 2001: Discussion document for research team of the Resource and Training Programme for Educator Development

2. CATEGORIES

2.1 Addressing Contextual Factors

This relates to various social, political and economic factors. This includes various factors relating to poverty, the HIV/AIDS pandemic, inadequate infrastructure (such as transport, water, electricity), substance abuse, various forms of violence in the community, and factors relating to the families of learners. These factors indirectly effect the teaching and learning in schools and other education institutions. The successful implementation of inclusive education is dependent on the extent to which these community and broader social issues are recognised as impacting on effective teaching and learning, and are addressed.

2.2 Developing Positive Attitudes and Respecting Diversity

Often the most serious barriers to learning are related to attitudes, in particular, to the lack of respect between the various role players in education. This includes attitudes towards others who are, or who learn, differently from ourselves. This is particularly true for people with disabilities. A key challenge in inclusive education is to facilitate respect for diversity, in particular, different learning styles, and to build on the strengths of these differences in the teaching and learning process. Building respect also involves fostering relationships of mutual respect between different role players (such as teachers and principals or district officials and members of the community), where every person's knowledge and experience is equally valued and acknowledged.

2.3 The Institutional/School Environment

Many of the barriers to learning can be located within the physical and psychosocial environment (e.g. ethos or culture of the institution) of the institution. Challenges for inclusive education in this category relate in many ways to issues around the effective functioning of the institution or school. Central to such effectiveness is the existence of leadership at the institution that can take forward the priorities for inclusive education and ensure that they are integrated into all aspects of the institution's functioning. At the school level this would include the policies and practices that inform how it functions as an institution, including how people relate to each other and how they make decisions. Challenges associated with the physical environment include having enough resources and an adequate infrastructure for learning and teaching to take place. It also includes making sure that the institutions are fully accessible and safe for all learners, including those with physical and sensory disabilities.

2.4 Support Provision

This relates specifically to the organisation and provision of support that is needed by institutions to facilitate the full participation and inclusion of all their learners in the learning process. Challenges here include the existence of necessary support structures in and outside the institutions, such as a DST, to ensure that educators in particular have access to the support that they need. Challenges also include making

sure that educators know about the support that is available within the community, both from education officials and from other community-based sources, and that they are aware of how to access it. It is important here to recognise the challenges that arise in ensuring that the full spectrum of support from the community is drawn upon, including the services of other important departments, higher education institutions and non-governmental organisations (NGOs), especially disabled peoples' organisations (DPOs) and organisations of parents of disabled children.

2.5 Curriculum Challenges

Curriculum factors that need to be taken into account when identifying barriers to learning and challenges for inclusive education include: accessibility and relevance of the content of learning areas; responsiveness of teaching strategies used; the language and medium of teaching and learning; availability and accessibility of teaching and learning materials and equipment; appropriateness of assessment procedures; and general flexibility of curriculum and classroom management. The location of inclusive education within the outcomes-based education (OBE) framework needs to be clearly made.

2.6 Management and Sustainability Challenges

This category relates to structures, procedures and processes that need to be developed and in place to support education institutions to implement and develop inclusive education practices. This includes, in particular, the establishment and successful operation of Institutional-Level Support Teams (ISTs), DSTs and leadership and management capacities of education officials at provincial and national levels. The capacity to lead and manage and to provide ongoing support to institutions needs to occur within and between these different levels of the education system. This includes an integrated approach to strategic planning as well as collaborative working relationships or partnerships within and across government departments.

3. FINDINGS FROM QUESTIONNAIRE

In the questionnaires, teachers and principals were asked to indicate what they thought the most important things were that should be done in their school to overcome barriers to learning and to put inclusive education into practice. They were then given five statements, which they were asked to look at, and to indicate whether they agreed with these or not. The statements listed were chosen to represent factors regarded as being central to the implementation of inclusive education at the school level and broadly covered the categories referred to above. They were also asked to write down other things that they felt should be done that were not captured in the statements. Table 7.1 below shows the responses of the teachers and principals from the three provinces.

Table 7.1*

Indicator	Teachers	Principals
The principals and teachers become aware of factors outside the school (e.g. hunger) which impact on learning and work on finding ways to overcome these barriers	311	19
All members of the school community treat each other with respect	216	18
The school has an IST that meets regularly to help teachers to address barriers to learning	254	19
Teachers organise their classrooms so that all learners feel included in the lesson	272	17
The school maintains a good working relationship with the district education department and the education officials help and support the school to put inclusive education into practice	264	22

* The majority of respondents chose more than one of the statements so the table indicates the frequency of responses to each statement (i.e. the number of teachers and principals who 'ticked' that statement)

The issue given most support by the teachers relates to awareness about barriers to learning arising from the external environment and the ability to overcome these barriers. In contrast, the issues given most attention by the principals relates to the development of a good working relationship with the Department of Education, including sustained support for the school. It is interesting, and perhaps not unexpected, that for teachers the priority is to be able to recognise barriers to learning and then to have the appropriate skills to address these barriers. This priority is also emphasised by the second most popular 'indicator' for teachers, that is, organising the classroom to include all learners. For teachers in the project then, an important indicator of progress towards building inclusive education is the progress that they are making in the classroom to address barriers to learning and include all learners.

The perspective of the principals is more orientated towards the management of inclusive education and the support that they require from the department to do this. A strong indicator for effective implementation of inclusive education for them is the nature and degree of support that they receive from the department.

Teachers and principals were also asked to indicate what else they felt should be done. The same question was asked of the other role players in the interview process. This list below summarises the points most commonly mentioned by all the respondents. These points have been integrated as indicators in the instrument presented in the next section.

- All learners are respected and valued. This includes ensuring that all learners are included in the learning process and recognised as being able to learn.
- The impact of 'non-education' issues (e.g. poverty) on learning are recognised (e.g. poverty) and addressed as barriers to learning
- Barriers to education are addressed at all levels of the education system from early childhood development (ECD) to higher education
- Collaborative working relationships are established, maintained and respected. This refers to a broad range of relationships that exist between role players at the school, between the school and the community, the school and the education department, within the education department and between the education department and other departments
- The IST and the DST are set up and functioning and able to play the role envisaged for them in White Paper 6
- Schools have the necessary physical and human resources that they need to create a safe and accessible infrastructure for effective learning to take place in the classroom and the broader school environment.
- Inclusive education and OBE are integrated within the curriculum at the classroom level, and in the management of structures and processes at the district, provincial and national level
- There are leaders or 'champions' at all levels of the system to take forward the building of inclusive education

4. INDICATORS FOR INCLUSIVE EDUCATION

4.1 Contextual Factors

Access:

- All learners in the community have access to schools or other education facilities within their community
- No learner of school-going age in the community is being excluded from a school for a reason that is in violation of the South African Schools Act (1996) or which contradicts the main provisions of White Paper 6
- The school and members of the community (including NGOs and DPOs) are involved in ongoing advocacy initiatives that try to identify and include out of school learners, and raise awareness about barriers to learning
- Parents/grandparents, or whoever looks after children at home, takes responsibility for ensuring that children attend school
- Parents of children with disabilities do not feel ashamed to bring their children to school, and are supported by schools to do this
- Community-based rehabilitation (CBR) is recognised as an important strategy to identify 'out of school youth', especially those with disabilities into the schools
- The inclusion of learners with disabilities is especially evident at the ECD level

School-Community Relationship:

- The development of the school is seen as an integral and central part of the development of the entire community
- The community 'owns' the school and is actively involved in its maintenance and in making it a safe and secure environment
- The need for parent empowerment strategies is recognised and implemented as a key aspect of inclusive education particularly at the school level

Barriers to Learning:

- Members of the school and community are aware of the main contextual barriers in the community that impact on the learning process (e.g. poverty, HIV/AIDS) and educators are aware of how to address these barriers, including knowing who to ask for help

Working Together:

- The schools in the neighbourhood support one another and know how to identify and draw in the support of people and organisations in the community

4.2 Developing Positive Attitudes and Respecting Diversity

- The school atmosphere reflects a culture of respect for all people in the school and the community (including parents/care-givers)
- All teachers in the school respect each other and their learners
- All learners in the school respect each other, and the teachers and principal are actively involved in helping learners to overcome prejudice among themselves
- Teachers and parents recognise that all learners have the potential to learn.
- The abilities of all learners are equally valued
- Learners with disabilities and other learners who experience barriers to learning are valued in the classroom and treated equally
- Prejudice about particular teachers or learners is actively addressed by the school.
- Awareness raising activities programmes are developed to build respect among all role players in the school
- All forms of discrimination in the school are actively addressed
- DPOs and organisations of parents of disabled children are actively involved in promoting awareness about discrimination of people with disabilities

4.3 Institutional/School Environment**Resources:**

- Schools have the necessary resources they need to create a safe and accessible infrastructure for effective learning to take place in the classroom and the broader school environment. This means that:
- Teachers have the basic level of teaching and learning materials that is needed for them to include all learners effectively in the lessons
- The school has enough classrooms for the recommended teacher: learner ratio
- All classrooms are accessible for all learners, including those with disabilities
- The school has adequate toilet facilities for learners and staff, including at least one toilet that is accessible for a person using a wheelchair

- The school is a safe and secure place for all learners and teachers

Management and Governance:

- School Governing Body (SGB) members understand and value the principles of inclusive education, and support its ongoing implementation within the school
- The school policy is written in such a way that it creates a good framework for building an inclusive environment (addressing barriers to learning and the diverse teaching and learning needs within the school)
- The SGB has set up a sub-committee to address barriers to learning
- The school is involved in an ongoing process of setting realistic and manageable goals aimed at making the school more inclusive
- Teachers, principals and members of the SGB are open to ongoing learning about ways to address barriers to learning
- The members of staff at school are broadly representative of the population of South Africa, including people with disabilities
- The school timetable is organised in a way that allows for flexibility to accommodate different learning programmes

Teachers:

- The relationship between teachers, and between teachers and the school management team is mutually respectful and they have a strong co-operative relationship
- Teachers have manageable workloads
- The school's staff development programmes include training and classroom support to educators so that they can develop their ability to address diverse needs and barriers to learning in the classrooms and in the school as a whole
- Teachers are given recognition for initiatives that help to develop the inclusive capacity of the school

4.4 Support Provision

In the School:

- Teachers meet regularly to discuss and find solutions to various problems which learners may be experiencing
- Teachers work together as a team
- Teachers, school management and parents work together to address barriers to learning
- All teachers receive ongoing training and classroom support to address barriers to learning
- Teachers know and understand how to get different forms of support from both in and outside the school

Institutional-Level Support Team (IST):

- An IST has been set up in the school and is functioning well
- Members of the IST are well trained to help the teachers in the school to address barriers to learning

District Support Team (DST):

- The DST is set up and functioning
- Members of the DST are able to assess what support the school needs and provide the appropriate support to the schools in this area
- Through the DST the school has access to specialised skills to help teachers to address particular barriers and to meet the learning needs of all learners in their classrooms
- Members of the DST work as a team with a commitment to sharing skills and knowledge, and supporting each other
- The DST is involved in assisting the school to manage the change process on an ongoing basis
- Early identification and intervention are recognised as a key function of the DST

Special Schools/Resource Centres:

- The special school/resource centre in the district works with the DST to support schools in the district
- Special schools/resource centres are provided, on an ongoing basis, with appropriate support to ensure that they have sufficient capacity to play their role as outlined in White Paper 6

Community Support:

- Other institutions and organisations in the community (e.g. universities and NGOs) work with the school and support it
- Schools have access to health services (e.g. school nurse and other health workers)
- The school makes use of a school-feeding scheme where 'hunger' is identified as a barrier to learning

4.5 Curriculum Factors

- Teachers understand the link between inclusive education and outcomes-based education (OBE)
- Teachers are implementing the OBE curriculum effectively to ensure the inclusion of all learners in the classroom
- The assessment framework within the OBE curriculum is able to help teachers to assess the progress made by all learners in their classroom
- Practical assessment tools are available and able to be used for this purpose
- Teachers receive training and ongoing support to ensure that all aspects of the curriculum are accessible to all learners
- Teachers are able to reflect on their practices in the classroom, and to monitor their own abilities to be inclusive
- Teachers acknowledge and value their role as the central role player in identifying and addressing barriers to learning in the classroom and the school
- Teaching strategies used by teachers are responsive to the learning needs of all learners in the classroom, and are based on theories of learning that develop the full potential of the learner
- Teachers have a holistic perspective about learning that includes developing the physical, emotional, moral and intellectual well being of the learner

- The medium of teaching and learning is appropriate to the language needs of all the learners in the classroom
- The teachers 'model' and facilitate respect for one another in the classroom and school
- Peer support amongst learners is seen as a valuable part of the learning process and actively promoted by teachers

4.6 Management and Sustainability

At School Level:

- The principal plays a strong leadership role in implementing inclusive education in the school, and in supporting teachers to use inclusive practices in their classrooms

At District, Provincial and National Level:

- Officials at district, provincial and national levels are equipped to manage and support the implementation of inclusive education
- The management of education services in the district includes the clustering of schools to facilitate mutual support and collaboration
- Education officials at the provincial and district level recognise the need identify learners who are being excluded from the system, and to find ways to bring them into the system
- Education officials at the provincial and district level are involved in ongoing advocacy initiatives that target out of school learners
- Education departments at the district, provincial and national level collaborate with other key line function departments and NGOs to ensure that inclusive education in the schools is supported through intersectoral collaboration
- The job description of subject advisors at district and provincial level includes responsibility for ensuring that all Learning Areas in the curriculum are accessible to all learners, and they seek help from members of the DST to assist them in doing this
- Strategic planning within the Department of Education constantly takes place to ensure that the management of inclusive education is recognised and addressed at all levels of service delivery (national, provincial and district level)
- Education departments at district, provincial and national level have an individual and/or a core group of committed people who take responsibility for driving the process of building inclusive education in the district, province and country

Training and Capacity Building:

- Bursaries for teacher development in the area of inclusive education are created in collaboration with higher education institutions and funding sources
- Conflict management skills are seen as a key component of the capacity building of district education officials and principals
- All public higher education institutions providing in-service training for teachers recognise that they need to foster attitudes among future teachers that will lead to respect for all learners, and an enthusiasm to accommodate all learning needs
- All public higher education institutions providing in-service training for teachers integrate into their curricula courses that promote the understanding of barriers to learning and how to facilitate inclusive practices in the classroom

Policy Implementation:

- White Paper 6 is being given appropriate attention and effectively implemented at all levels of the education system, and its central principals are integrated into the process of teaching and learning in all institutions and education initiatives
- Those in leadership positions at national and provincial level provide guidance and support in the implementation of White Paper 6 to education officials at all levels.
- Leaders at national and provincial level have the political commitment to sustain the ongoing implementation of inclusive education in the country
- District offices and schools are guided in the implementation of White Paper 6 by clear, understandable national and provincial guidelines for implementation, including workable mechanisms for ongoing monitoring and evaluation

CHAPTER EIGHT

RECOMMENDATIONS

1. INTRODUCTION

This final chapter captures the key recommendations emerging from the findings of the evaluation of the project. These recommendations are grouped under ten broad areas. Under each of these key areas, specific strategic proposals are presented.

It should be noted that these recommendations do not only relate to the further implementation of inclusive education in the three pilot districts. Most of them, in fact, refer to strategies that we feel should be pursued at a national level – across and within all provinces and districts. While many of these recommendations are not new – and are touched on in some way or another in White Paper 6 and in the guidelines that have been developed from that – they emerge directly from the findings of this evaluation. One could argue, therefore, that the findings from these three pilot projects reinforce strategic actions that have already been identified at national level.

It should also be noted that the recommendations made below do not arise out of criticisms of the initiatives in the three pilot projects. In fact, in most cases, they arise out of the positive learnings – the successes – of these projects.

2. IMPLEMENTING POLICY

The recommendations outlined here relate directly to the way in which the further implementation of White Paper 6 should be pursued, on the basis of the findings of the evaluation of the three pilot districts.

It is recommended that:

- 2.1 The ‘learnings from good practice’ from the three pilot projects are shared with the country and the South African Development Community (SADC).** It is noted that the Department of Education has committed itself to developing an accessible booklet that can serve this purpose.
- 2.2 The pilot districts, in consultation with their provincial officials, develop strategic plans to ensure that the ‘pilot’ is sustained and further developed.** This includes the necessary ‘exit plans’ that are currently being developed in the districts concerned. It is important that a plan for sustainability be developed in these areas – to avoid the gains being eroded as a result of disillusionment.
- 2.3 The pilot districts be included in the national implementation of inclusive education, in the designated, ‘nodal’ districts identified for initial focus in the country.** In some instances, this has occurred naturally. In other instances, an intentional effort will have to be made to ensure that the pilot districts are not just ‘dropped’ in the national implementation plan.

- 2.4 The ‘top-down’/‘bottom’-up’ approach to policy implementation pursued in the pilot project be considered in the expansion of the implementation of this policy.** This includes the need to identify and pursue strategies to facilitate ‘top-down’ support (through commitment to and enforcement of White Paper 6). And it includes the need to look at how the action research model of developing inclusive schools and classrooms can be realistically accommodated in the process. This will require creative use of existing resources and the injection of extra resources for a few years.
- 2.5 Adequate human and financial resources be allocated to ensure that support, at all levels of implementation, is provided. External donor funding support should be included in the strategies pursued to finance the implementation of this policy, but this contribution should be located within realistic time-frames.** The latter point highlights that the two-year programme supported by Danida was limited in its ability to support implementation of the new policy. A realistic time-frame – to allow for the time needed for both structural and personal/professional transformation to occur – needs to be considered.

3. MANAGEMENT AND LEADERSHIP CHALLENGES

The recommendations in this section relate to the challenges of ensuring that a critical mass of people are equipped to provide the direction and leadership required to implement this policy across the country, and that effective management to support the implementation process is developed at all levels of implementation.

It is recommended that:

- 3.1 All relevant senior education officials at provincial and district levels be made aware of the value and importance of this policy, and their pivotal roles in ensuring that it is implemented.** This relates to the need for ‘top-down’ support for successful implementation of the policy to occur.
- 3.2 At school, district, provincial and national levels, concrete steps to implement the policy are integrated into the Department of Education’s central strategic planning and programme development.** This is necessary to ensure that the implementation happens, but also to ensure that systemic transformation – of all aspects of the curriculum and education system – occurs. This is fundamental to the principles and framework of inclusive education outlined in White Paper 6.
- 3.3 In every province and district, dedicated posts be allocated to inclusive education – to ensure that there are ‘drivers’ to take this process forward in a focused way.** The evaluation has very clearly revealed that you need ‘champions’ (people with understanding of and passion for the challenges of inclusive education), and ‘drivers’ – to push for and provide direction for the integration of this policy. This reflects a very clear need for good ‘leadership’ to implement this policy.

- 3.4 Provincial capacity building plans be developed to ensure that all relevant education officials at provincial, district and institutional level understand the challenges and their roles and responsibilities in addressing these.** It is clear that all relevant education role players need to be made aware of and be equipped to play their pivotal role in supporting the implementation of inclusive education. It is proposed that this be included in provincial plans of action over the next year.
- 3.5 The capacity building programmes and materials that have been developed by the three pilot projects be further developed and expanded, and utilised nationally.** The pilot projects have already developed very good programmes and materials which, with some further work, could be used for all provinces. It is proposed that a national consortium be formed to pursue this. This consortium should include members from the three pilot provinces, and others who reflect the ‘voices and ears’ of ‘target audiences’, and relevant materials development expertise.
- 3.6 The draft instrument of ‘indicators for inclusive education’ presented in Chapter Seven in this report be used as a basis for providing guidelines and developing benchmarks to help provinces, districts and schools to implement inclusive education.** This chapter reflects a culmination of a process of trying to develop ‘local’ indicators for inclusive education, drawing on the concrete experiences of role players in the three pilot districts. It is proposed that the Department of Education consider how it can use this as a basis for purposes outlined above.

4. PROVISION OF SUPPORT

In this section, the recommendations relate to the support needed in the schools and at district level to help schools to address barriers to learning in their local contexts.

It is recommended that:

- 4.1 Provincial capacity building plans be developed to ensure that core education support providers in the districts are prepared for their roles and responsibilities relating to working in integrated teams to support schools.** This task is so important if successful implementation of this policy is to be achieved that formal, accountable provincial plans, supported by the necessary resources, need to be developed.
- 4.2 In particular, special schools/resource centres be targeted for capacity building to assist them to re-orientate towards their new roles as resource centers.** White Paper 6 highlights this as a priority in the implementation plan. The findings from this evaluation support this need very strongly. A commitment to pursuing this strategy needs to be developed at all levels, and this commitment needs to be supported by the necessary human and financial resources.

- 4.3 The capacity building programmes and materials that have been developed by the three pilot projects be further developed and expanded, and utilised nationally. (Refer 3.5 above.)**
- 4.4 Universities responsible for pre-service training of the various education support personnel be made aware of the implications of the new policy for the role of the professionals concerned, so that they are appropriately prepared.** This is a very important aspect of preparing support providers for their roles in the districts and, where appropriate, at other levels of support provision. There is clear evidence that existing professional roles need to be examined, challenged, and transformed, if members of the intersectoral support teams are to fulfill their roles with confidence and success.
- 4.5 Provinces develop a formal strategy for establishing and developing the District Support Teams (DSTs) in their region.** The successful implementation of inclusive education in the schools and other education institutions is dependent on the extent to which they can access the support they need (particularly for their own capacity building) to address barriers to learning in their own contexts. Given the number of 'districts' in the country, the establishment of the DSTs will need careful, realistic strategic planning to ensure that it happens over the next few years.
- 4.6 Each district be given the responsibility and capacity to develop a formal strategy for establishing and developing the Institutional-Level Support Teams (ISTs) in their areas.** The role of helping schools and other education institutions to develop ISTs is clearly identified and prioritised in White Paper 6. The findings from the pilot project highlight the importance of doing this in a well-planned and sustained way, within the context of overall institutional development.
- 4.7 The three pilot districts in this project formalise the establishment of DSTs in their areas.** At the time of this evaluation, the three pilot districts had not formally established DSTs in their districts. They are aware of the need to do this, and so should be provided with the necessary support to ensure that this is done in the near future.

5. WORKING TOGETHER: THE CHALLENGE OF INTERSECTORAL COLLABORATION

The findings of this evaluation reveal that the challenge of working together, while clearly necessary and invaluable, is not easy! There are some central principles that have emerged from experiences in this and other countries that can be used to guide this process. The recommendations in this section refer to some of these.

It is recommended that:

- 5.1 **In capacity building processes, the relevant education officials, within the Department of Education, become aware of why they need to work together to provide an integrated and coordinated support service to schools and other education institutions.** The need to motivate for the development of an integrated and coordinated approach to support provision and service delivery is highlighted here because it seems (from the evaluation and elsewhere) that many education officials are not yet aware of why they need to do this, never mind how to do it! The latter aspect would, of course, have to be addressed accordingly.
- 5.2 **Within the Department of Education, planning for support provision be pursued within an integrated strategic planning framework.** This recommendation relates to the 'how' referred to above.
- 5.3 **High-level consultations with other key relevant government departments be pursued to ensure that 'support from the top' is given to the potential education support providers in these departments.** The evaluation has revealed that non-education-employed support providers at district and school levels need to have 'top-level' support from their 'bosses' if they are to be able to participate as effective members in intersectoral education support teams.
- 5.4 **In the development of DSTs, other relevant support providers (outside the Department of Education) are identified and drawn onto the team through appropriate procedures and processes.** Once the core education support providers (those employed by the Department) have been appointed to DSTs, they need to identify who they need to draw in from outside of the Department to help them to address the barriers to learning and needs in their areas. This includes conducting needs and situation analyses (modeled well in this pilot project), as well as 'asset-audits' or 'community-resource profiling' mapping of existing human resources to help in addressing these challenges.
- 5.5 **DSTs are provided with training focused on preparing them to 'work together'.** The effective provision of integrated and comprehensive support to schools is largely dependent on the extent to which the intersectoral teams are well-coordinated and are able to 'work together'. Capacity building programmes need to include modules or units that focus specifically on the challenges of intersectoral collaboration. (This is being developed in some universities in the country, and in other parts of the world.)

6. BUILDING COMMUNITY PARTNERSHIPS

One of the key learnings from this evaluation has been the realisation that implementing inclusive education is most successful when it is pursued within a school-community partnership framework. What has also become clear from this pilot project is that one of the 'spin-offs' of implementing inclusive education is that it helps to build positive school-community relationships! The recommendations that follow emerge from the findings relating to this.

It is recommended that:

- 6.1 The value and importance of a community-based approach in the implementation of inclusive education be highlighted and included in the capacity building programmes of all relevant role players.** While the verbal commitment to working within a community-based framework is in White Paper 6, and in the conversations of many, the challenges of 'turning the education system around' are so great that creative ways of bringing in the community to help are often not properly pursued. All relevant role players should be made aware of the value to themselves and to the community in pursuing a community-based approach.
- 6.2 The health promoting schools strategy be highlighted as a successful way of bringing relevant government departments and the community together to address the many psychosocial issues facing schools in South Africa.** The evaluation, and evidence from other programmes in the country and world have proved the success of this strategy in building schools and communities surrounding them, and in developing a positive school-community relationship itself.
- 6.3 The importance of finding ways to include parents/care-givers in the process of addressing barriers to learning in schools be highlighted, and included in capacity building of principals and school support structures. This includes examining the extent to which parents are able to be involved.** This latter point is important as the evaluation reveals that, in many cases, parents are not available or able to provide support to their own children or to the school. This is either because they have to work; or because they have died as a result of HIV/AIDS and other scourges relating particularly to poverty conditions; or because they are not financially able to support the school, and feel ashamed as a result; or because they are not treated as real partners in the life of the school, including in the school governing structures.
- 6.4 Non-governmental organisations (NGOs) and Disabled Peoples' Organisations (DPOs) be intentionally included in the development of community-based support provision to schools.** The evaluation has clearly shown the valuable role that NGOs and DPOs (including organisations of parents of children with disabilities) and other forms of community organisation can play in addressing barriers to learning in local contexts. The 'spin-off' of developing positive attitudes towards 'difference', including

disability, by involving people with disabilities in leadership positions in these efforts cannot be over-emphasised.

- 6.5 In all capacity building programmes aimed at support providers, the need to confront dynamics relating to power relations between the different partners should be a key focus.** The findings of the evaluation have highlighted the need to honestly confront and address the challenges of different sectors working together – in relation to the way in which they engage with the dynamics of power that are located within these relationships.

7. CURRICULUM CHALLENGES: INTEGRATING INCLUSIVE EDUCATION WITHIN THE OUTCOMES-BASED EDUCATION (OBE) CURRICULUM FRAMEWORK

A key challenge in implementing inclusive education in South Africa is to locate the challenges relating to this new policy directly within the national OBE curriculum framework. The recommendations highlighted below relate directly to this.

It is recommended that:

- 7.1 The concept and ‘language’ of identifying and addressing barriers to learning be used as a way of helping teachers to relate the challenges of inclusive education into the core purpose of their work: to promote effective learning.** Focusing on the core purpose of teaching and learning when implementing inclusive education has the positive effect of making teachers and other role players less ‘overloaded’; helps in the development of an integrated approach to implementation of this policy; and directs these efforts to the central work of the Department of Education.
- 7.2 All programmes aimed at helping educators to implement inclusive education be integrated into OBE training programmes.** This highlights the point made above and elsewhere in these recommendations: that an integrated approach to educator development needs to be developed.

8. EDUCATOR DEVELOPMENT

Professional development is a key strategy in implementing any new education policy. In this pilot project, it has been the key focus of interventions pursued. Many valuable learnings have emerged from this. The recommendations highlighted below draw from these learnings

It is recommended that:

- 8.1 A national consortium, including the three pilot provinces, be developed to take the programme and materials development process further so that they can be used in both pre-service and in-service educator development programmes throughout the country.** As with the recommendation around capacity building programmes and materials development, this consortium should also include the ‘voices and ears’ of

educators (especially English second-language teachers, and teachers from very disadvantaged and rural areas).

- 8.2 The above mentioned consortium should include the necessary expertise to assist with improving the accessibility of the materials and build the capacity for others to learn these skills.** Facilitation of the process referred to above needs to ensure that all these voices are heard in the process, which means dealing with the power relation dynamics referred to above.
- 8.3 The challenges of implementing inclusive education be integrated into existing and future teacher education and educator development programmes.** Refer to recommendation 7.2 above.
- 8.4 The Department of Education explore how a ‘training and support’, ‘school-based’ approach to training could be pursued in the different provinces.** Although it is recognised that this approach to educator development is resource-intensive, the Department of Education needs to decide whether it is going to pursue a ‘broad-superficial’ approach, or a ‘narrow-deep’ approach to this area of education transformation in this country. There is evidence from other efforts in the country to suggest that ‘broad-superficial’ approaches may not only be limited in effect, but even counter-productive. There is also evidence, from the pilot projects, that a ‘narrow-deep’ approach has the potential to be very successful. It is proposed, therefore, that the Department of Education consider pursuing a ‘narrow-deep’ approach, and build in the sharing of ‘learning from good practices’ and other ‘roll-out’ strategies in the implementation of inclusive education over the next twenty years.

9. ADDRESSING CONTEXTUAL CHALLENGES

The evaluation of the pilot project has revealed that most of the barriers to learning that teachers are confronting in their classrooms are of a psychosocial nature. In particular, challenges relating to poverty, various forms of abuse, and the effects of HIV/AIDS have to be addressed if effective teaching and learning is to occur for all learners. The recommendations outlined below relate to these challenges.

It is recommended that:

- 9.1 Through capacity building programmes, education officials as well as educators are assisted to understand why and how they need to address psychosocial issues in order to promote effective teaching and learning in their schools.** The direct link between these challenges and the teaching and learning process needs to be highlighted. This is important if education officials are going to realise that, despite their feelings of ‘overload’, they have to find ways to address these barriers in their schools and classrooms if effective teaching and learning is going to take place. Resources to support these officials then need to be provided.

9.2 Other government departments that can assist the Department of Education to address these challenges be identified and drawn into DSTs. This requires both formal and informal processes to ensure that structural support is provided for this intersectoral collaboration. With regard to the process of identifying who should be drawn in, refer to recommendation 5.4 above.

9.3 Relevant community resources (people, groups, and organisations) be identified and drawn into DSTs and ISTs to address these challenges. This is crucial if a community-based approach to support provision is to be developed in this country. Refer to recommendation 5.4 above for concrete ways in which the identification of these resources could be pursued.

10. ADDRESSING ATTITUDE CHALLENGES

One of the 'success' stories emerging from all three pilot projects is the extent to which attitudes towards inclusive education, and more particularly, relating to diversity, especially towards people with disabilities, have been positively developed. This is a crucial aspect of implementing inclusive education and the development of a new progressive discourse around 'inclusion'. The recommendation highlighted below relates to this challenge in South Africa.

It is recommended that:

10.1 The existing advocacy and information campaigns at national and provincial levels be intensified to support the provincial and district programmes of implementation. All the role players who participated in the evaluation highlighted the importance of national and provincial support in the process of addressing negative attitudes (mostly relating to fears) related to the implementation of inclusive education itself, and towards people with disabilities more specifically.

RESEARCH TEAM

1. MID-TERM NATIONAL QUALITY EVALUATION RESEARCH TEAM

Team Member	Functions
Sandy Lazarus (<i>UWC: Faculty of Education</i>)	National Quality Evaluator
Colleen Howell (<i>UWC:Education Policy Unit</i>)	National Quality Evaluator
Gabriel Cele (<i>UWC:Education Policy Unit</i>)	Researcher (KwaZulu-Natal)
Raji Matshedisho (<i>Univ. of Cape Town</i>)	Researcher (North West)
Vuyokazi Nomlomo (<i>UWC: Faculty of Education</i>)	Researcher (Eastern Cape)
Berenice Daniels (<i>Western Cape Education Dept.</i>)	Programme/materials assessor (KZN)
Petra Engelbrecht (<i>Univ. of Stellenbosch</i>)	Programme/materials assessor (N.W.)
Washiela Sait (<i>South African Federal Council on Disability</i>)	Programme/materials assessor (E.C.)

2. END-TERM NATIONAL QUALITY EVALUATION RESEARCH TEAM

Team Member	Functions
Sandy Lazarus (<i>UWC: Faculty of Education</i>)	National Quality Evaluator
Colleen Howell (<i>UWC: Education Policy Unit</i>)	National Quality Evaluator
Ray Basson (<i>Univ. of the Witwatersrand, Action Researcher Project Consortium</i>) Ezna Flattery (<i>NW Project Co-ordinator</i>)	Management and administration of evaluation questionnaire
Nithi Muthukrishna (<i>Univ. of Natal, Leader Project Consortium</i>) Jabulani Ngcobo (<i>KZN Project Co-ordinator</i>)	Management and administration of evaluation questionnaire
Sithembele Africa Peter (<i>Disabled People South Africa, Action Researcher Project Consortium</i>) Tiny Stofile (<i>EC Project Co-ordinator</i>)	Management and administration of evaluation questionnaire
Deena Naidoo (<i>Research consultant</i>)	Research assistant: Qualitative content analysis of all questionnaires
David Langhan (<i>Education consultant</i>)	Programme/materials assessor: language/accessibility perspective and active editor of 'learning from practice' manuscript
Lilian Lomofsky (<i>UWC: Faculty of Education</i>)	Programme/materials assessor: university teacher education perspective
Washiela Sait (<i>South African Federal Council on Disability</i>)	Programme/materials assessor: 'community' relevance and accessibility perspective
Phillip Dikgomo (<i>National Dept. of Education</i>)	Programme/materials assessor: educator development perspective – respondent to materials assessment team

