Learning from Difference

Understanding Community Initiatives to Improve Access to Education

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Abbreviations and acronyms

AIDS   Acquired Immune Deficiency Syndrome

ANC   African National Congress

DFID   Department for International Development (UK Government)

EENET   Enabling Education Network

EFA   Education for All

HIV   Human Immuno-deficiency Virus

INSPRO   Inclusive Schooling Programme (Zambia)

MDG   Millennium Development Goal

MIEP   Mpika Inclusive Education Programme (Zambia)

MoEC   Ministry of Education and Culture (Tanzania)

NGO   non-governmental organisation

PLA   participatory learning and action

PRA   participatory rural appraisal

PRSP   Poverty Reduction Strategy Paper

PTA   parent-teacher association

TB   tuberculosis

TAMH   Tanzania Association of Mentally Handicapped Persons

UN CRC   United Nations Convention on the Rights of the Child

UPE   universal primary education

Executive summary

This report presents the findings of a participatory action research project entitled 'Understanding Community Initiatives to Improve Access to Education'. The study was carried out in primary schools in Mpika, Zambia, and Dar es Salaam, Tanzania, between July 2001 and December 2002, in collaboration with researchers, associated with the Enabling Education Network (EENET), based at the University of Manchester. EENET's work as an information-sharing network, which promotes the inclusion of marginalised groups in education worldwide, pointed to the need for accounts of inclusive practice written by Southern practitioners.

The intention of the study was to encourage practitioners to articulate practice through developing written accounts that could later be shared with other practitioners working in similar contexts. This generation of Southern accounts would promote more inclusive educational practices by providing a body of much-needed South-based evidence on which practitioners can draw as reference material and examples of good practice.

The study's processes examined ways of encouraging analytical and writing skills among stakeholders in predominantly oral cultures. It drew on a combination of workshops and other structured reflective activities with teachers, parents and children as a means of promoting reflection and, in the longer term, changes in thinking and practice. A barrier analysis approach was used to encourage teachers to look more carefully at the way attitudes, the environment and institutions prevent the full participation of marginalised groups in education and in society. Video and other image-based approaches were used to promote reflection and documentation. The study also explored the role of external facilitators in *building the capacity of* practitioners to reflect, analyse and document their experience of promoting inclusive education.

The report is structured around the following research questions:

- How can people with different knowledge, skills and perspectives be helped to think about, document and learn from their efforts to address barriers to the learning and participation of all children?

- What needs to happen to make this process empowering, particularly for practitioners and people from marginalised groups?

- How can the particular experiences of one community speak to a wider audience and at the same time remain authentic?

- How can insiders and outsiders best work together to improve practice?

The challenge and complexity of inclusion

The term inclusive education has traditionally been associated with the inclusion of disabled children and those categorised as having special learning needs. This study however defined inclusion, or inclusive education, as being;

> the process of increasing the presence, participation and achievement of *all* students in their local schools,

with particular reference to those groups of learners who are at risk of exclusion, marginalisation or under-achievement.

Many existing initiatives to promote inclusion in schools in the South have tended to emphasise externally-led training activities, often based on Northern models, and lacking local ownership, or adequate understandings of the complexity of the issues. Often, inclusion has been managed by external expertise rather than by mainstream teachers themselves. In contrast, this study encouraged teachers as practitioners to analyse their own experiences of working towards inclusion, and produce their own accounts. Through these processes, teacher practitioners also had opportunities to develop their own thinking and engage with issues that had been the domain of 'specialists' in the past.

The research sites were selected because of existing efforts to promote inclusive education in local schools, with a focus on learners identified as having special needs, and the involvement of specialist teachers. In Tanzania we worked with four primary schools and a special school; and in Zambia with 14 primary schools, two of which had special units.

A key methodological principle was to listen to different voices, including the voice of disabled people. This principle should also be central to the development of inclusive practice, but is not easy to achieve. The almost wholesale exclusion of disabled people from formal education over generations means that there are very few disabled adults who have the relevant education, experience and financial security to make a contribution to inclusive education initiatives. Despite our recognition that self-advocacy by disabled people is one of the most effective ways of bringing about lasting change and of reducing barriers to learning and participation, only a small number of disabled people were identified in Tanzania to participate in the study, and none were identified in the Zambian context.

Developing a shared understanding about inclusion

In both research sites, much time was devoted to the development of a shared understanding of the concept of inclusive education.

In Zambia, the research facilitators and participants contributed to this through their reflective and analytical activities, and through the writing of accounts. The concept changed and developed as the study progressed, and some of

the research participants were successful in internalising the concept. In Tanzania, research participants were at a much earlier stage in this process and so there was less evidence of the success of this approach in developing such an understanding.

Progress on the conceptualisation of inclusive education in Zambia appeared well developed because so many pre-conditions for inclusion were in place prior to the study: a history of collaborative ways of working and of group problem solving through teachers' meetings; Child-to-Child principles were well established and helped in addressing attitudinal barriers to inclusion; some teachers had developed democratic practices in their classrooms, including active learning in groups rather than in rows, and students were involved in evaluating teachers' performance. However, some of the written accounts generated through this study provided evidence that not all practitioners shared the same values and beliefs about such fundamental issues as democracy and human rights, and some teachers were resistant to changes in their practice.

Most of the Zambian teachers involved in the study placed a strong emphasis on child participation in the classroom context, and so we had expected that children would have been involved in the action research process. However they restricted their research activities to teachers and expressed a lack of confidence and skills in working with children. It seems that research was regarded as an adult-centred activity with a focus on using a formal style of writing. By contrast, in Tanzania, the importance of listening to a wide range of voices was taken very seriously and a big effort was made to ensure child participation in the research activities, including children with learning difficulties.

The barrier analysis approach to inclusion enabled teachers to begin to move away from associating inclusive education exclusively with disabled children, and to see inclusion as a broader concept. Approximately ten per cent of the teachers' written accounts focused specifically on disability and difficulties in learning, but these issues were mentioned in passing in many of the other accounts. This did not mean that there was widespread support for this approach to inclusion – as not all teachers were involved in the study, and a segregationist approach continued in the minds of many teachers – but a significant minority of mainstream teachers engaged with this new conceptualisation.

The role of the facilitator in leading the action research process was crucial. The external facilitators provided a stimulus to thinking and support with reflection, analysis and documentation; while the internal facilitators supported stakeholders intensively over a long period of time in a range of activities to promote their development as reflective practitioners. Sharing a common understanding about diversity and inclusion is a pre-requisite for this role, together with good communication skills and experience of group facilitation.

Teacher development

The processes used in the study enabled mainstream teachers to develop expertise and confidence in teaching inclusive classes – working in collaboration with special education teachers. This does not mean that there is no place for manuals or training on how to implement inclusive education; but the development of local expertise and the reduction of dependency on outside expertise is likely to be achieved when stakeholders engage in a collaborative process, such as the one described in this report.

There are clear implications from this study for formal teacher education programmes:

- Pre-service training should prepare teachers for the inclusive settings in which they will be working, rather than the specialist units which tend to see themselves as having a separate identity and structure from the rest of the school.

- There is a need for a combination of: in-service training of mainstream teachers, to enable them to respond to the new demands of inclusive classrooms; and innovations in pre-service training to prepare all teachers to be able to implement national policies on universal primary education for all children.

Use and relevance of specialist facilities and personnel

Identifying a particular teacher as being responsible for making education inclusive for a specific client group has tended to contribute to the segregation of children identified as having special needs within inclusive settings. The medical model of disability and learning difficulties becomes further entrenched when particular teachers are identified as the 'inclusive education teachers'.

One of the tensions and controversies surrounding the transition to more inclusive forms of education for disabled children is the need for the role of specialists to change and adapt to a new way of working. In both research sites specialist facilities were attached to some of the schools, and the perception of most teachers, in both countries, was that inclusive education needed the expertise of specialists. Yet in Zambia it was the mainstream teachers' concern about the social isolation experienced by children being educated in one of the units that initially motivated their exploration of inclusion.

The study found that it was possible for specialist teachers to adapt their knowledge and experience, and to use their expertise in an advisory capacity in the school, rather than exclusively in the units. Additional training that supports specialist teachers to adapt their skills to support a larger number of children within mainstream settings would be necessary to transform the current situation, where specialists tend not to see the relevance of their skills to a wider range of children. However, this study also found it was possible for specialists to adapt their knowledge of teaching in a segregated setting to an

inclusive setting, *without* any extra training, simply by changing their orientation.

Re-conceptualising inclusion in practice

The barrier analysis approach adopted in this study involved asking a series of open questions about: who was, or was not, attending, participating and achieving in school; what barriers were faced in promoting inclusion; what knowledge already existed; and what information needed to be collected. In contrast to training which allocates responsibility to specialists, this barrier analysis approach provides non-specialists with reflective and analytical skills with which they can contribute to promoting inclusive practice. This approach helped broaden debate beyond disability in education to inclusive development in a range of relevant sectors: accessible sanitation, transport, rehabilitation technology, etc. This demonstrated the potential of the approach in raising awareness of these broader issues and in developing a common understanding about issues of educational inclusion. There is room to develop this approach further.

The written accounts produced as part of the action research process have been recognised as potentially useful training materials because they start with existing indigenous knowledge and experience, and familiar contexts. They serve several purposes: as a stimulus for further reflection; as in-service and pre-service training material; and as inspirational material to be shared among wider audiences. The extent to which these accounts would serve such a wide range of purposes had not been anticipated prior to the study.

This study has indirectly contributed to the Millennium Development Goal of reducing poverty by promoting inclusive education for those children who are currently excluded from school, or who are marginalised within education and so are not making progress in school. The study was consistent with the principles outlined by the Department for International Development of promoting inclusive development while at the same time ensuring a twin track approach to disability. Inclusive education is one of the best examples of inclusive development and has arguably made more progress than other sectors in promoting the inclusion of disabled children, yet many governments still do not perceive disability as being part of the mainstream agenda.

Recent evidence from a wide range of international agencies working on disability and development issues shows that disability issues are not being addressed in the Poverty Reduction Strategy Paper (PRSP) process. Although lobbying has resulted in more awareness, and there has been some consideration of these issues in Uganda, in general disabled people are not perceived as being economically active and their organisations are not perceived as stakeholders.

Education for All and inclusive education: ways forward

While there is now a facilitating international framework for educational inclusion, promoting more inclusive practices in education is dependent upon

a clear understanding of the concept of inclusive education, and particularly on its place within Education for All. It may be that this issue is too controversial to allow the formation of consensus; but at least there needs to be a healthy debate about inclusion and exclusion in order to move towards a shared understanding and greater dialogue. Unless practitioners and policy makers alike are engaged in debate about the complexity of these issues, and are moving towards a shared understanding of the way in which inclusive education can be achieved, it is unlikely that there will be much progress, either at policy level or in practice. There is a general consensus internationally that inclusion is important and in keeping with the UN Convention on the Rights of the Child, and so on, but there is much less agreement about how it should be implemented.

Action research proved successful in supporting practitioner conceptualisation of the 'inclusive education task'. However, it is necessary to engage with practitioners in each context, with their own unique and complex history of the issue, since reasons for exclusion vary enormously from context to context. Practitioners and policy makers require support in reflecting on the meaning of inclusion, and in internalising a view of inclusive education, which ideally should be negotiated in their context. Unless this is done, there remains a danger that Northern models of special education are perpetuated and inclusive education simply becomes an extension of existing special education provision. In this case, opportunities for change and transformation, which inclusive education provides, are missed.

If education is to become more inclusive, responsibility for this process of educational transformation has to be assumed by mainstream educationalists. This involves much more than providing an educational response to disabled children and those identified as having special learning needs, although the importance of addressing the specific needs of these learners should not be overlooked. Changes will be required at national policy level, and at district and school level; in the curriculum; in teacher education; in school leadership; in community involvement; and in the way national and international agencies work. Although this study focused primarily on school-based activities, inclusive schools can provide a starting point for promoting a more inclusive society, as the Salamanca Statement (Article 2) emphasises:

> 'Regular schools with this inclusive orientation are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system.'
>
> (UNESCO 1994)

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think   act

look
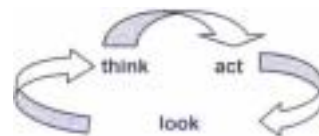
Introduction

1.1 Background to the study

In this report the outcomes of a collaborative action research study in Tanzania and Zambia are explored. The study was led by the Enabling Education Network (EENET) at the University of Manchester, and involved an investigation of a process designed to facilitate improved discussion and sharing of ideas on inclusive education in Southern contexts. It is a process that can help education practitioners move away from a reliance on external help to conduct formal research and produce documents, so that they can make a more active and informed contribution to the development of inclusive practices in education.

There is no agreed international definition, so inclusion (or inclusive education) is defined here as being the process of increasing the presence, participation and achievement of all students in their local schools, with particular reference to those groups of learners who are at risk of exclusion, marginalisation or underachievement. Inclusive education is considered to be a central strategy in achieving social inclusion, or an inclusive society.

The full title of the study was 'Understanding Community Initiatives to Improve Access to Education', with the shorter working title of 'The Writing Workshops Project'. However the study involved the use of a *wide range of processes* to promote reflection, analysis and documentation, not just writing, and so we refer to this piece of work simply as 'the study'.

This report has been prepared as the tenth anniversary of UNESCO's World Conference on Special Needs Education in Salamanca approaches. Participants from 92 governments and 25 international organisations met to further the objective of Education for All by considering the fundamental policy shifts required to promote the approach of inclusive education. The tenth anniversary of the Salamanca Statement (UNESCO, 1994) provides us with an opportunity to consider how thinking has moved away from a narrow focus on the impairments of individual children in the last ten years towards a broader concept of inclusion which focuses on the challenges all learners face within education systems. Difference and diversity can be seen as a catalyst for educational change, by offering opportunities for transforming education and moving practice forward.

1.2 EENET

EENET is an international network which provides exciting and useful information about including all children in education, focusing on income-poor

countries. (*See Appendix 1 for more information about EENET.*) The need for this study arose directly from EENET's information-sharing experience. Since EENET's inception in 1997, it has faced considerable difficulties in identifying, collecting and sharing examples of instructive practice, as told by stakeholders in inclusive education at community level in countries of the South. Stakeholders include teachers, teacher educators and policy makers, but they can also include parents, community members, learners themselves and representatives of marginalised groups.

Although the initial inspiration for the establishment of EENET came from the work of Save the Children UK's global disability programme – and the key people involved in setting up the network had professional backgrounds in special education – there was a commitment from the beginning to ensure that EENET maintained a *broad* understanding of the term 'marginalisation'.

1.3 The problem the research addressed

Children continue to be marginalised from educational opportunities, despite international commitments to provide every child, youth and adult with educational opportunities through Education for All, and the Millennium Development Goals (MDGs) which focus on gender equality, universal primary education and eliminating poverty.

Children with economically poor backgrounds, girl children, children from nomadic and other minority ethnic families and children affected by HIV/AIDS face marginalisation from and within education. Disabled children may belong to any one of these marginalised groups, and so are vulnerable in many different ways. Disabled children are disproportionately represented in the out-of-school population, and since they are not a homogenous group, some children, such as those with multiple impairments, often experience greater marginalisation from services than others. By contrast children with unrecognised difficulties in learning tend to repeat classes and eventually drop out of school without ever having these difficulties recognised. As long as children from marginalised groups continue to be excluded from educational opportunities, the cycle of poverty and educational exclusion will continue, and the MDGs of eliminating poverty and improving access to education will not be achieved.

One of the main difficulties EENET faced in collecting written accounts was how to support practitioners working in the context of a predominantly oral culture to document their work. They are often over-loaded, do not have confidence in their writing abilities, and do not realise that their stories will be of value to others working in similar cultural contexts, where material resources are limited and class sizes are very big.

Traditionally children experiencing difficulties in learning have been perceived to be the problem, and strategies have been developed to 'fix' these problems, often through special education. This can sometimes lead to a form of exclusion within the mainstream. The study looked at ways in which the often artificial separation between the perceived educational needs of

disabled children and their non-disabled peers can be overcome through a process of barrier analysis. A barrier analysis approach encourages education practitioners to look at the difficulties, or barriers, that the learners are facing in their social and educational environment, as well as addressing barriers faced by individuals.

1.4 Aim of study

The main aim of this collaborative action research study was to explore appropriate and sustainable ways of building the capacity of key stakeholders in education to reflect, analyse and document their experience of promoting inclusive education. By developing analytical and writing skills, the study indirectly aimed to build the research capacity of inclusive education practitioners.

Collaborating with teachers and, to a lesser extent with children and parents, this action research project sought to achieve a deeper understanding of inclusion and exclusion. A barrier analysis approach was used to focus on ways of maximising learning and participation, rather than focusing exclusively on individual learners identified as having special needs. The study also explored the ways in which school communities can be supported to develop reflective practitioners, and to include vulnerable children and those considered to be 'at risk', such as disabled children.

1.5 Using collaborative action research methods

Action research is an approach that involves the collection of information in the workplace in order to bring about changes in thinking and practice. It involves the identification of an issue within a particular context in order to address it in that context. This leads to a continuous process of observation, reflection and action by practitioners, with the aim of improving practice rather than producing knowledge.

The approach adopted in this study has involved a combination of collaborative inquiry methods, as used in English schools, and 'participatory learning and action' (PLA), as practised primarily in the South. This combined approach involved group processes and visual methods of recording, in which the behaviour and attitudes of external facilitators were often more important than the research methods used.

In order to present the principles of action research in a straightforward and non-academic way to the research participants in the field, we focused on three key actions: look, think and act.

Look   at one particular aspect of your work. Collect some information. (Observation notes, drawings, photographs, taped interviews)

Think   about the information you have collected. Reflect on what you have heard, seen, drawn or written. (Use mind maps, photographs, video material)

Act   on this new information by doing something differently.
               (Make a home visit, conduct a survey, try out a new teaching
               method, etc)

Look   at the results. Observe any changes. Collect some more
               information. Try some new methods of collecting information.
               (Count, measure, compare, conduct further interviews, etc).

We have used the following image in this report in order to reinforce the
process that was used, and to highlight that the process is cyclical and
changing constantly.
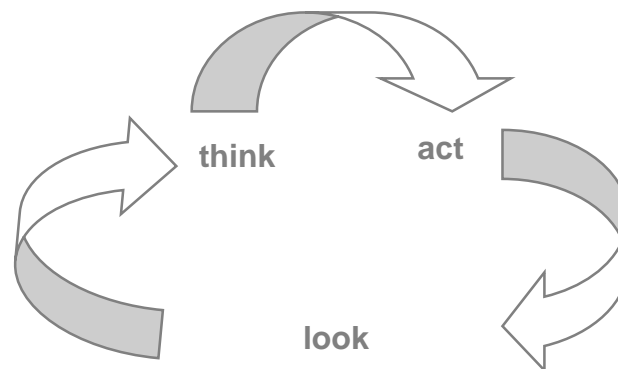
Action research is often called 'insider-research'. Insiders come to their own
conclusions about their research in order to make decisions about how they
are going to change their practice, though they may decide not to change
anything. In this study the external facilitators, or 'outsiders', have played a
role in supporting the 'insider researchers' – primarily at a distance – to think
through their work, their research and the changes they wanted to introduce.
Although the terms 'insider' and 'outsider' have been used in this report, it is
acknowledged that this is an over-simplified version of events and that in
practice the respective roles of external and internal facilitators, and research
participants, have been more complex than this. Each member of the
collaborative research team has made their own individual contribution to the
study, sometimes as insider, sometimes as outsider, and sometimes as a
combination of both.

1.6 Study objectives

The EENET study was exploratory, short term and small scale. It was also
carried out on a very low budget in each country. This was part of a deliberate
attempt to support a sustainable way of promoting action research, which the
research participants would be able to maintain after the formal end of the
study. The study assessed the extent to which the development of analytical
and writing skills can lead to a process of reflection and evaluation, and to
changes towards more inclusive practice in schools and communities.

The discussion is focused on the following research questions:

- How can people with different knowledge, skills and perspectives be helped to think about, document and learn from their efforts to address barriers to the learning and participation of all children?

- What needs to happen to make this process empowering particularly for practitioners and people from marginalised groups?

- How can the particular experiences of one community speak to a wider audience, and at the same time remain authentic?

- How can insiders and outsiders best work together to improve practice?

In order to encourage this reflection, learning and the sharing of knowledge (for example through supporting school communities to produce group stories of their experiences) we used the following principles and methodology:

- using existing knowledge

- building on experience

- collecting information

- working together

- listening to different voices

- creating conversations.

The action research methodology used in the study was unusual in that it was the basis of the intervention in each of the contexts, and, at the same time, the means of collecting and engaging with evidence in relation to the overall research questions. Further explanation of the practical implications of this approach are provided in Chapter 4 of the report.

1.7 Significance of the study

The particular focus of this research is different from other studies on inclusive education because it is concerned with all forms of marginalisation in education, and seeks to explore how barriers to the learning and participation of all children can be overcome as a result of collaborative inquiry. Most research that has been undertaken in sub-Saharan Africa on inclusive education has maintained a narrow focus on inclusive education as a special education issue, rather than as a whole-school issue linked to school improvement and equity. It has also tended to involve the introduction of technical strategies imported from countries of the North. This is beginning to change, however, as some practitioners and researchers have come to recognise the importance of culture and context, of responding to the barriers learners face in particular contexts, and the potential for using existing knowledge as a basis for developing inclusive practices. See, for example, Naicker (1999), Muthukrishna (2000), Kasonde-Ngandu and Moberg (2001).

It has generally been assumed that the gap between research and practice is a result of inadequate dissemination strategies, the implication being that educational research *does* speak to issues of practice, if only the right people would listen. Yet research findings will continue to be ignored, regardless of how well they are communicated, because they by-pass the ways in which practitioners formulate the problems they face and the constraints within which they have to work. The methodology used in this study required a newly formed group of stakeholders to engage in a search for a common agenda to guide their enquiries and establish ways of working that enabled them to analyse their existing experience, and collect and find meaning in different types of information. Such an approach aims to overcome the traditional gap between research and practice.

1.8 Location

The study focused on school communities in Mpika, Zambia, and in Dar es Salaam, Tanzania, where there was already some experience of implementing inclusive practices, with a particular emphasis on disabled children who had previously been excluded or marginalised within the educational setting. In Dar es Salaam, the study focused on five primary schools and one special school, which had all been designated as pilot inclusive education schools by the Ministry of Education. In Mpika, 12 primary and basic schools were involved in the study, including two schools which has special units attached.

The original intention had been to carry out part of the action research in India, but organisational difficulties made this impossible. However, related activities using similar processes and materials have been developed by members of the team in other countries, including Portugal, Romania and the UK. These experiences have been shared on EENET's website and have contributed to the development of the project, particularly in respect to the use of group processes as a means of collecting and engaging with evidence.

1.9 Who was involved?

This collaborative study was led in the UK by the Co-ordinator of EENET and by the Co-Director of Educational Support and Inclusion, a research and teaching group within the University of Manchester's School of Education, where EENET is based. We refer to these as the external facilitators.
There were two internal (research) facilitators in both countries, who were well known to EENET and were committed to sharing information and ideas about inclusive education. Research committees were set up in both countries to co-ordinate, support and manage the action research activities. The Zambian committee was drawn from a group of interested teachers in six of the 12 primary and basic schools involved in the study. This included a head teacher, teachers trained in special education and the internal facilitators, who were part-time teachers and involved in part-time in-service training. The internal facilitators in Tanzania were independent Tanzanian consultants. Their committee had a much broader representation of stakeholders, including Ministry of Education and Culture (MoEC) staff members, university lecturers,

community members, and a national parents' organisation, the Tanzania Association of the Mentally Handicapped (TAMH).

The whole international research team – from Zambia, Tanzania and the UK – only met on two occasions. The first meeting was held in Dar es Salaam in July 2001, and involved a range of action research activities, such as school visits, discussions with the MoEC, research committee meetings, and writing workshops. The second meeting was held in Mpika in July 2002, and included a similar range of activities. Apart from these face-to-face meetings, all other communication took place by email, although hard copies of large documents have had to be posted, due to the expensive and unreliable Internet connections, particularly in Zambia. Occasional telephone contact has been possible between the UK and Tanzania.

This report draws upon materials produced by all those involved in the study, including: workshop reports written by the internal facilitators; minutes of research committee meetings; stories of inclusion and exclusion written by workshop participants; observation notes made by the Zambian and UK facilitators; and video footage, audio-cassettes, photographs and mind-maps created at various stages.

1.10 Report structure

The report begins in Chapter 2 with a consideration of the conceptual confusion surrounding the key terms 'inclusion' and 'inclusive education'. It sets the discussion in the context of international developments and provides an explanation of the barrier analysis approach to inclusion. This is followed in Chapter 3 with an introduction to the research context, and the research facilitators, committees and participants.

Some of the processes used in the study to promote the development of reflective practitioners are introduced in Chapter 4, which looks at the methodology and its ongoing development. In Chapters 5 and 6 we provide a commentary on some of the data collected, by discussing the use of images in the promotion of reflection, and by analysing teachers' written accounts. In Chapter 7 we reflect on the collaborative nature of the study and some of the communication challenges faced in conducting the study in this way. Finally, in Chapter 8, we summarise our findings and consider the policy implications. We also provide some details about the dissemination strategy which will be implemented over the next two years.

The appendices include: a guide to EENET's network and information-sharing activities; a summary of the literature used to inform the study; a definition of mind-maps; an action learning poster and EENET newsletter article; letters from the Ministry of Education in Zambia; a case study of a special unit; and a list of useful publications.

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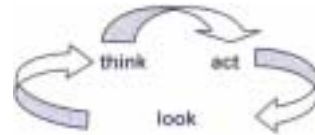
The challenge of inclusion

> 'Inclusive education in a developing country implies the equal right of all children to the "educational package", however basic that package may be.'
>
> (DFID 2000, p.12)

This chapter considers the wider policy trends that provide a context for this study. In particular, it examines recent changes in thinking about the ways in which education systems should respond to vulnerable groups of learners, particularly those with physical, sensory and intellectual impairments, and others categorised as having 'special learning needs'.

In conducting the study the research team had to engage with the complexity and current conceptual confusion surrounding the term 'inclusive education'. In this chapter we try to throw light on this complex background. In so doing we also make reference to relevant international instruments and documents that have influenced the emergence of a rights-based approach[1] to education for marginalised groups. This leads us to explain the approach to inclusive education that underpins the study.

2.1 A note on terminology

In carrying out and reporting this study, we have faced many dilemmas about the terminology we should use in referring to marginalised and excluded learners. In particular, we have had to decide about our position on the use of the term 'special needs' (sometimes called 'special needs education' or 'special educational needs'), which is now widely used in many countries.

The concept 'special educational needs' was originally put forward in England by the Warnock Committee, in a report that addressed the issue of the education of children with disabilities (Department for Education and Science 1978). As a result of the subsequent Education Act of 1981, the use of disability categories was abolished and special educational needs became an administrative category to refer to *any child who experienced difficulties in learning during his/her school career*.

The Act states that 18 per cent of children would be seen as having 'special educational needs' at some stage in their school career. At the time, this was seen as a great leap forward, both in the use of language, and in the perception of disability and difficulties in learning, replacing such terms as 'educationally sub-normal' and 'maladjusted' (Barton 1993). Subsequently, however, it has been argued that the special needs conceptualisation has led to an increase in the proportion of children placed in categories of exclusion (Fulcher 1989; Ainscow 1999).

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Over the last 20-25 years the term 'special educational needs' has been adopted in many countries around the world. At the same time it has continued to be used without any clear definition, and so its very nature has been, and continues to be, contested. Consequently, referring to groups of children as 'special needs children' often gives them an unhelpful label, and as a result helps to ensure their segregation from other children, without addressing the environmental and educational barriers to their learning.

In this report we have, therefore, chosen not to use the term 'special needs', other than when referring to the work of others in the field who choose to use this formulation. Instead we have opted to use phrases such as 'seen as having' or 'categorised as having special needs'. We sometimes use the term 'special education', since it is a more general term summarising a variety of approaches to the education of disabled children and those experiencing difficulties in learning. We refer to children who have a range of physical, sensory and intellectual impairments collectively as disabled children.[2] Children who experience both temporary and long-term difficulties in learning which cause them to drop out of school completely, often after several years of repeating the same grade are referred to as having 'difficulties in learning'.

We use the term 'inclusive education' in this report to refer to the process of addressing barriers to the presence, participation and achievement of *all* children in their local neighbourhood schools. Inclusive practices and concepts vary according to local circumstances, and so barriers and solutions to learners' presence, participation and achievement in educational settings also vary from school to school, from country to country, and from region to region. We believe that by promoting a barrier analysis approach to schools and communities, practitioners can be enabled to develop a problem-solving approach to the development of inclusive education. This approach yields very different results from one which focuses on the deficits, or impairments identified in individual children. Instead practitioners focus on the children's assets and on the resources available in their context. They can then engage with, and learn from difference and diversity and bring about meaningful educational change. At the same time, in the process of addressing barriers, we believe that it is important to keep a particular eye on those learners who are most at risk of marginalisation, under-achievement or exclusion, such as disabled children.

2.2 The development of special education

The development of the field of special education has involved a series of stages during which education systems have explored different ways of responding to disabled children, and to others who experience difficulties in learning. Special education has sometimes been provided as a supplement to general education provision, in other cases it has been totally separate. An analysis of the history of special education provision in many Northern countries suggests certain patterns (Reynolds and Ainscow, 1994). Initial provision frequently took the form of separate special schools set up by religious or philanthropic organisations. This was adopted and extended as part of national education arrangements, often leading to a separate, parallel

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school system for those pupils seen as being in need of special attention. There is some evidence of similar trends in developing countries (Mittler et al, 1993). For example, Kalabula (2000) refers to the fact that all the special schools in Zambia were established by missionaries and charitable organisations, and although the Ministry of Education now pays many of the teachers, the schools essentially belong to those organisations.

In recent years, the appropriateness of separate systems of education has been challenged, both from a human rights perspective and from the point of view of effectiveness. Initial views, which emphasised that the source of difficulties in learning came from within the learner, ignored the environmental influences on learning. Yet there is strong research evidence to suggest that home and school influences explain the quality of learning and that educational difficulties can arise from sources, other than impairments (Ainscow, 1991). It is now being strongly argued that reorganising ordinary schools within the community (through school improvement) ensures that all children can learn effectively, including those categorised as having special needs (Ainscow and Brown 1998; Clark et al 1997).

Integrated placement has, in some cases, involved a 'transplantation' of special education practices into the ordinary mainstream. In this way, integrated programmes have sometimes taken the form of special classes within ordinary schools. As a result, this trend towards ordinary school placement has not been accompanied by changes in the organisation of the ordinary school, its curriculum and teaching and learning strategies. This lack of organisational change has proved to be one of the major barriers to the implementation of inclusive education policies over the last ten years since the Salamanca Statement was issued.

2.3 From integration to inclusion

A problem reported from a number of Northern countries is that despite national policies emphasising integration, there is evidence of a significant increase in the proportions of pupils being *categorised* in order that their schools can earn additional resources (Ainscow 1991). As a result of her analysis of policies in Australia, England, Scandinavia and the United States, Fulcher (1989) suggests that the increased bureaucracy that is often associated with special education legislation (and the inevitable struggles that go on for additional resources) have the effect of escalating the proportion of children who come to be labelled as disabled. As an illustration she describes how – in Victoria, Australia during the 1980s – some pupils in regular schools came to be described as 'integration children'. She notes that over 3,000 children came to be regarded in this category, (which had not existed prior to 1984), and that often schools would argue that these pupils could not be taught unless extra resources were made available. It is because of situations such as this, of course, that changes over time in the reported numbers of 'integrated' children with special needs must be treated with caution. Dissatisfaction with progress toward integration has caused demands for more radical changes in many countries (e.g. Ainscow 1991; Ballard 1997; Skrtic 1991; Slee 1996). One of the concerns of those who adopt this view is

with the way in which pupils come to be designated as having special needs. They see this as a social process that needs to be continually challenged. More specifically they argue that the continued use of what is sometimes referred to as a 'medical model' of assessment – within which educational difficulties are explained solely in terms of a child's deficits – prevents progress in the field, not least because it distracts attention from questions about why schools fail to teach so many children successfully.

Such arguments have led to proposals for a re-conceptualisation of the 'special needs' task. This revised thinking suggests that progress will be much more likely if we recognise that difficulties experienced by pupils result from the ways in which schools are currently organised and from the forms of teaching that are provided. Consequently, it is argued, schools need to be reformed and pedagogy needs to be improved in ways that will lead them to respond positively to pupil diversity – seeing individual differences not as problems to be fixed (as in Figure 1), but as opportunities for enriching learning. Within such a conceptualisation, a consideration of difficulties experienced by pupils and by teachers can provide an agenda for reforms and insights as to how such reforms might be brought about. However, it has been argued that this kind of approach is more likely to be successful in contexts where there is a culture of collaboration that encourages and supports problem-solving (Ainscow 1999; Skrtic 1991).

Figure 2: The system as the problem

Teachers' attitudes

Poor quality training

Rigid methods, rigid curriculum

Lack of teaching aids and equipment

Education system as problem

Inaccessible environments

Parents not involved

Many drop-outs, many repeaters

Teachers and schools not supported
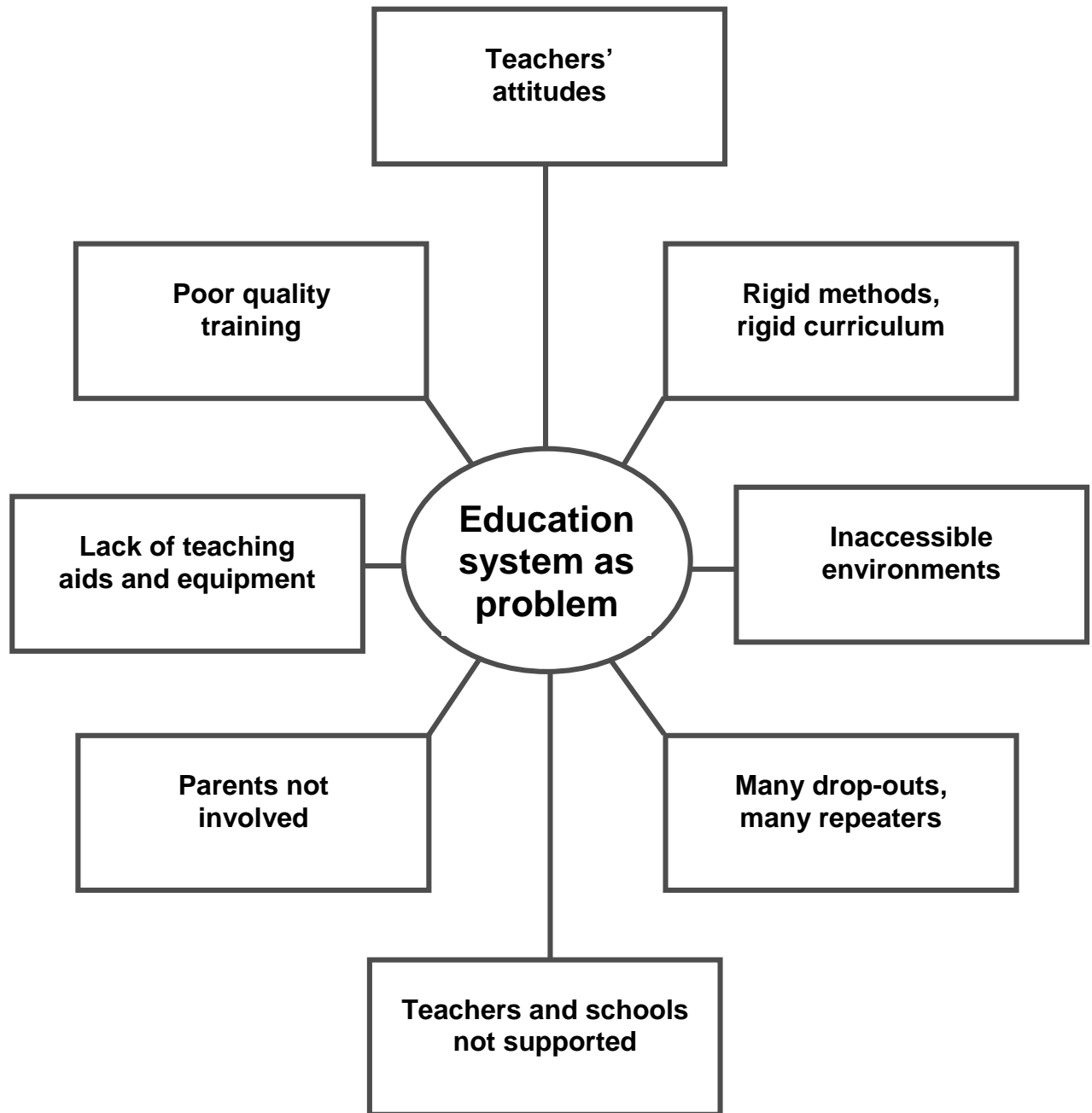
It was this approach that we explored in this study. Specifically, it led us to see the development of inclusive practices as involving those within a particular context in working together to address barriers to education experienced by some groups of learners. It has to be recognised, however, that such an approach brings yet further complications. Driven, in part at least, by ideological considerations, the idea of inclusive education as a process of school improvement challenges much of the existing thinking in the special education field, whilst, at the same time, offering a critique of the practices of general education. It asks, why is it that schools throughout the world fail to teach so many pupils successfully? This raises the issue of system change, which inclusive education aims to address (*see Figure 2*).

In the next section of this chapter we move on to consider the way in which this new conceptualisation of inclusive education, influenced largely by Northern writers, is seen as part of the international efforts and commitment to provide every child, youth and adult with educational opportunities that meet their basic learning needs, through Education for All (EFA). In particular, in this study, we have focused on the right of every child to access, and participate in, universal primary education (UPE).

2.4 Education for All

> 'Inclusive education is part of a larger movement towards tackling social exclusion; it seeks to include children on the margins of society, street and working children, excluded minorities.'
>
> (DFID 2000, p.12)

The issue of inclusion has to be seen within the context of the wider international discussions around EFA, stimulated by the 1990 Jomtien Declaration on Education for All. In this early documentation on EFA, there was a rather token mention of 'special needs'. This has been gradually replaced by a recognition that the inclusion agenda should be seen as an essential element of the whole EFA movement. Thus, instead of an emphasis on the idea of *integration, (*with its assumption that additional arrangements will be made to accommodate pupils seen as being special within a system of schooling that remains largely unchanged), we now see moves towards *inclusive education,* where the aim is to restructure schools in response to the needs of all pupils (Sebba and Ainscow 1996).

Although the Dakar Framework for Action (UNESCO 2000) and the subsequent MDGs on Education, provide the most up-to-date frame of reference on EFA, the documents produced as a result of a UNESCO Conference held in Salamanca continue to provide a valuable reference point for all those involved in lobbying for inclusive education. Specifically, 'The Salamanca Statement on Principles, Policy and Practice in Special Needs Education' (UNESCO 1994) provides a framework for thinking about how to move policy and practice forward. Indeed, this Statement, and the accompanying Framework for Action, is arguably the most significant

international document that has ever appeared in special education. It argues that regular schools with an inclusive orientation are:

> '...the most effective means of combating discriminatory attitudes, building an inclusive society and achieving education for all.'

Furthermore, it suggests, such schools can:

> '...provide an effective education for the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system.'

Salamanca encourages us to look at educational difficulties in new ways. This new direction in thinking is based on the belief that changes in methodology and organisation – made in response to pupils experiencing difficulties – can, under certain conditions, benefit all children. In this way, pupils who are currently categorised as having special needs come to be seen as a stimulus for encouraging the development of richer learning environments.

Moves towards inclusion are endorsed by the UN Convention on the Rights of the Child – UN CRC (UN 1989). Specifically, the adoption of the Convention by the UN General Assembly and its subsequent ratification by 187 countries, imposes a requirement for radical changes to traditional approaches to provision made for disabled children. The UN CRC contains a number of articles which require governments to undertake a systematic analysis of their laws, policies and practices and assess the extent to which they currently comply with the obligations.

Article 28 of the UN CRC asserts the basic right of every child to education and requires that this should be provided on the basis of equality of opportunity. In other words the Convention allows no discrimination in relation to access to education on grounds of disability. Furthermore the continued justification of the types of segregated provision made in many countries needs to be tested against the child's rights not to be discriminated against; Articles 28 and 29, together with Articles 2 and 3 imply that all children have a right to inclusive education, irrespective of impairment and disability. Article 23, however, suggests that disabled children need 'special care', as well as education, and so could be interpreted to mean some form of segregated education.

The UN Standard Rules for the Equalisation of Opportunities for Disabled Persons (UN 1993) make it very clear that the rights of disabled people are to be achieved through a policy of inclusion. Although not legally binding, it provides a globally recognised framework for the formulation of rights-based disability legislation by governments. Disabled children's rights to inclusive education can be secured through a combination of the UN Standard Rules and the UN CRC (Jones 2001).

Yet the Dakar Framework acknowledged the continued marginalisation of many groups of children, particularly those from minority ethnic groups and those with 'special learning needs'. Disability-focused organisations were so

concerned that the education of disabled children was likely to continue to be overlooked within EFA, despite existing international frameworks and conventions, that they lobbied for the establishment of a 'flagship'. In 2002 a UNESCO Flagship on 'Education for All and the Rights of Persons with Disabilities: Towards Inclusion' was created to raise awareness of this issue (see www.eenet.org.uk/key_issues/efa/flagship.shtml for more information. Similar concerns about safeguarding the rights of disabled people have led to the setting up of an Ad Hoc Committee for the development of a UN Convention on 'Promotion and Protection of the Rights and Dignity of Persons with Disabilities' (UN/Division for Social Policy Development 2003).

Advancing towards the implementation of inclusive education is far from easy and evidence of progress is limited in most countries. Moreover, it must not be assumed that there is full acceptance of the inclusive philosophy. Not only are many mainstream educationalists resistant to the idea, but many disability-focused organisations argue for separate, 'specialist' services. Organisations of deaf people tend to argue, for example, that deaf children have to be educated separately in order to guarantee their right to education in the medium of sign language and access to deaf culture. Also, there are those who believe that small specialist units located in the standard school environment can provide the specialist knowledge, equipment and support for which the mainstream classroom and teacher can never provide a full substitute.

In summary, as we consider the way forward for developing educational systems that encourage and support the development of schools that are effective in reaching all children in the community, it is necessary to recognise that the field itself is riddled with uncertainties, disputes and contradictions. However, what can be said is that throughout the world attempts are being made to provide more effective educational responses to such children, and that, encouraged by the Salamanca Statement, the overall trend is towards making these responses, as far as possible, within the context of general educational provision. As a consequence this is leading to a reconsideration of the future roles and purposes of specialists and specialist facilities in education.

2.5 Inclusion in countries of the South

Whilst many of the debates and disputes about the moves towards inclusive education are driven by Northern agendas, they clearly have implications for policy initiatives in countries of the South. In economically poorer countries many groups of learners are particularly vulnerable to marginalisation and exclusion, not only disabled learners.

The literature on special and inclusive education in the South is sparse, and has tended to be dominated by authors who have a special education background, most of whom are based in the North. A search carried out in 1994, for example, revealed less than 25 articles relating to education and disabled children in developing countries of the South (Stubbs 1994). Statistics on disability and inclusive education lack consistency in their

definitions, degrees of impairment and disability, and cultural context. Commenting on her review of this literature, Stubbs concludes that: many cultural assumptions have been made by the Western authors about the form that special/inclusive education should take in the South; indigenous knowledge has been overlooked; statistics are unreliable; and critical evaluations of donor-funded special education programmes, modelled on Northern practice, are urgently needed.

Jones et al (2002) highlight the fact that children with learning difficulties are considered disabled in the North, but may go unnoticed in Vietnam, where physical labour is more highly valued than literacy. Similarly people with albinism are automatically considered disabled in Africa, and are often highly stigmatised, yet in the North they tend to be included. Cultural contexts clearly have a major influence on definitions of impairment and disability.

The questions asked in a recent survey in Uganda illustrate the different definitions of inclusive education that are in use. Ugandan teachers were given seven definitions of inclusive education from which to choose. The majority of teachers chose the EFA option, 'It is universal primary school education'. The second most popular option was 'Free education', while only a very small proportion of teachers opted for 'a curriculum for all' or 'the inclusion of disabled children'. In a later question they were asked whether disabled and non-disabled children should attend the same school and 64 per cent expressed their disapproval (Baguwemu and Nabirye, 2002). Most of the teachers did not understand the term 'inclusive education' as being related to the education of disabled children. Yet, internationally, the term has been appropriated by those working in the field of special and inclusive education, and does not tend to be used when referring to the education of other marginalised groups.

In most countries of the South, there is a serious problem with very high school failure, repetition and drop-out rates. It was beyond the scope of this study to explore this issue in relation to the inclusive education agenda. However, it seems likely that children who are often labelled as 'slow learners' and tend to drop out of school are likely to have unrecognised and unidentified difficulties in learning. In many countries in sub-Saharan Africa children who do not do well in class are collectively referred to as 'slow learners', distinguishing them from the 'fast learners' who receive the majority of teachers' time and attention. They tend not, however, to be considered as having special educational needs.

The challenge of educating children identified as being 'slow learners' was discussed by the Zambian teachers who participated in this study. This label carries with it worrying assumptions that these learners have deficits and so risks further entrenching a medical model approach to children experiencing difficulties in the school system, and fails to draw attention to the failure of the school system to meet their diverse needs.

2.6 Barriers to participation and learning

Bearing in mind the arguments presented in this chapter, in carrying out the study we adopted what we will refer to as a 'barrier analysis approach' to the challenge of inclusion. This led us to involve stakeholders in particular communities in processes of inquiry, reflection, analysis and documentation. Barrier analysis focuses attention on contextual factors that may be preventing some learners from participating in educational opportunities. For example, it has been argued that disabled learners may experience discrimination as a result of the following forms of barrier:

- **attitudinal** – for example, fear, embarrassment and low expectations

- **environmental** – for example, inappropriately and inaccessibly designed school buildings and toilets. This could also include geographical and financial barriers

- **institutional** – for example, where there is no legal provision to ensure that disabled children can access education.

<div align="right">(Ashton, cited in DFID 2000, p.8)</div>

Similarly, it has been argued that, 'the elimination of poverty and progress towards sustainable development will only take place if there are increased and improved levels of education' (DFID 2000, p.2). It has also been suggested that the numbers of people living in poverty will not be reduced as long as disabled people, and other marginalised groups, continue to be excluded from education (HelpAge International 2002). Poverty is not only about rates of income, however, but also about social exclusion and powerlessness. Yeo and Moore (2003) suggest that 'the dearth of scholarship on disability and poverty seems to be both a cause and effect of the exclusion of disabled people and disability issues from development policy and practice, as well as an aspect of the very exclusion which defines disability'.

The contexts in which this study took place are ones in which national policy advocates the inclusion of marginalised groups, including disabled children, in education, and in which free education had been introduced in January 2002, mid-way through the study. Despite these national commitments to UPE, however, the situation in individual schools reflected problems with 'absenteeism', educational 'failure', repetition of grades, and learners dropping out of school altogether, in an overall context of poverty. Addressing the barriers experienced by disabled learners has to be seen in this wider context of competing priorities and agendas.

In an in-depth study of classroom practices in a Tanzanian primary school, Mmbaga (2002) identified two main groups: those children whose difficulties are due to social problems at home, and those who cannot cope with the demands of the curriculum. Children identified as having special educational needs were represented in both groups. However, Mmbaga's study concluded that nobody in the primary school was asking the question *why* some groups of children are experiencing difficulties in learning, whether their problems are

home-based or school-based. In our study there *was* a strong emphasis on asking why.

In this context, therefore, it makes more sense to talk in terms of children who are 'at risk' of a range of marginalising or exclusionary factors, rather than focusing on particular examples of 'at risk' children. Many children in the South, including those who have impairments, are likely to be vulnerable in various ways. The effect of 'multi-vulnerability' is to further entrench people in a cycle of poverty and marginalisation. A girl child with a physical impairment, for example, may also be affected by HIV, poverty and other marginalising factors. So, for example, commenting on their study of the implementation of inclusive education policies in Uganda, Afako et al (2002) noted that disability was only one problem amongst many other problems that the children had. Many children were orphans, victims of abuse, ill with a range of illnesses, including AIDS, and were hungry and poor.

The development of appropriate responses to diversity and disadvantage has a particularly interesting history in South Africa, where the system discriminated against learners on racial grounds, prior to the dismantling of apartheid. The breaking down of barriers created by race was a priority under the post-apartheid constitution and the White Paper 1 of 1995. Social justice and redress throughout society was the focus. Yet the 'Policy Framework for Education and Training Discussion Document' produced by the African National Congress (ANC) in 1994 (cited in Naicker 1999) highlights the 'special case of the disabled learner'. Naicker sees the singling out of 'disabled learners' as a major contradiction to the ANC's struggle against exclusion and oppression, and the vision of a democracy in which all voices are heard.

It was not until 1997 that a report was produced jointly by the South African National Commission on Special Needs in Education and Training and by the National Committee on Education Support Services (Department of Education 1997) arguing that a *range of needs* existed among all learners, which must be met if effective learning and development is to be sustained. Furthermore the reports argued that the education system should address those factors that lead to the failure of the system to accommodate diversity, or which lead to learning breakdown (Muthukrishna 2000). This was the first report to challenge the conceptualisation of 'special needs' in South Africa, and it came to be seen internationally as an example of the way in which the 'special needs' agenda has the potential to transform whole education systems. Naicker suggests that, '…it is important that the majority of educationists in mainstream education take ownership of the management of diversity' (Naicker 1999, p.26).

2.7 Developing a stance

Given the complexities outlined in this chapter, it was important that we should be clear about our own stance on the issue of inclusion and how it should be addressed in this study. We decided to emphasise processes of inquiry, in ways that were intended to support, help and, indeed, challenge

people to look at barriers to participation and learning within given contexts. By encouraging such a barrier analysis approach we hoped to 'open up', rather than 'close-down', the debate on the inclusion of marginalised groups in education. We believed that this would be a useful approach as it encourages practitioners to ask relevant questions about the context in which learning is taking place – and so promotes inquiry – rather than locating the problems in the individual learners.

In setting up the study it was necessary to have a working definition of the somewhat elusive idea of inclusion in education. Broadly speaking we defined it as: a process of increasing the participation of pupils in, and reducing their exclusion from, their local schools – not forgetting, of course, that education involves many processes that occur outside of schools.

Keith Ballard argues that inclusive education has to be seen as part of the wider struggle to overcome exclusive discourse and practices, and against the ideology which asserts that we are each completely separate and independent. This leads him to conclude:

> 'We cannot put people away from ourselves… There is no *away*. We live in complex interdependencies with the planet we inhabit. Whatever we do, whatever is done, includes us all, no matter what strategies we may use in an attempt to distance and isolate ourselves. Actions that exclude and diminish others exclude and diminish ourselves.'
>
> (Ballard 1997, p.254)

Consequently, we took the view that the agenda of inclusive education has to be concerned with overcoming barriers to participation that may be experienced by any pupils. In further developing this barrier analysis approach to inclusive education, we asked education practitioners, children and their parents to consider ways in which barriers to *presence, participation and achievement* in education could be overcome.

However, the tendency is still to think of inclusion policy or inclusive education as being concerned only with disabled pupils and others categorised as having special educational needs. Furthermore, inclusion is often seen as simply involving the movement of pupils from special to mainstream contexts, with the implication that they are 'included' once they are there. In contrast, we see inclusion as a never-ending process, (rather than a simple change of state), dependent on continuous pedagogical and organisational development within the mainstream.

A narrow view of inclusion has particularly limited usefulness and relevance in economically poorer countries, and experiences in these countries could help to influence a more appropriate policy focus in the North. It is clear that anywhere in the world a lack of facilities, the need for curriculum reform, insufficient or inappropriate teacher education, poor school attendance, problems of family poverty, cultural dislocation, the conditions giving rise to street children, problems of disease, and differences between the language

of instruction and the home language, may be as important as issues of disability in affecting participation in schools.

All of this moves the issue of inclusion to the centre of discussions about the improvement of schooling. Rather than being a somewhat marginal theme concerned with how a relatively small group of pupils might be attached to mainstream schools, it lays the foundations for an approach that could lead to the transformation of the education system itself. Of course none of this is easy, not least in that it requires the active support of everybody involved in the business of schooling, some of whom may be reluctant to address the challenges that we have outlined.

In recent years there has been an increasing emphasis on technology as a means of solving the world's problems, yet this may be a distraction from solving the problems that we face. In many ways the arguments that led to the design of this study reflect this view. They reject the idea that we should first be required to prove that providing a shared education for all children within a community is effective. They also cast considerable doubt on the assumption that further technological progress is necessary in order to achieve more inclusive forms of schooling. Instead they focus attention on a scrutiny of the barriers that prevent inclusive schooling from happening within particular contexts, and on how these can be overcome. This leads us to conclude that we already have enough knowledge to teach all children successfully. The big question is, do we have the will to make it happen, and are we prepared to share that knowledge and learn from it? As we will show in reporting this study, this is largely dependent upon practitioners developing a shared understanding of the values and beliefs that underpin inclusive education.

Notes

[1] A rights-based approach is a political approach which encourages and supports social movements of the oppressed to demand their rights (Fiedrich and Jellema 2003, p.186).

[2] Definitions of key concepts in disability

'Impairment and disability: Strictly speaking, *impairment* refers to an actual physical loss or reduction of functioning in an individual, e.g. loss of vision, hearing, movement, speech, or ability to learn. *Disability* on the other hand, refers to the way in which an individual with an impairment is dis-abled by the society, through barriers to access, discrimination, exclusion etc. So it is accurate to speak of persons *with impairments*, or *disabled* people (not people with disabilities). But the term 'disability' is often used interchangeably with the less common term 'impairment', particularly outside the UK.' (Stubbs 2003a, p.4)

'Individual and Social Models of disability: The Individual Model of disability incorporates both the charity and the medical models. It perceives the disabled person as the problem, and does nothing to change society. This model is still prevalent in development co-operation and is supported by donors who want a quick and visible fix, such as building an institution or a special school whilst leaving society and the education system unchanged. In the 'social model', disability is perceived as a relationship between the individual and society. It is consistent with the human rights approach. In development co-operation, it provides a sound basis for analysis and planning… The Social Model does not deny or exclude the need for appropriate rehabilitation and medical treatment, but it implies that the system should adapt to the person, not the person to the system.' (ibid. p.8)

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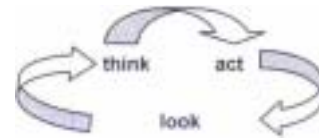
The research context

3.1 Temeke District, Dar es Salaam, Tanzania

Five pilot inclusive schools situated in a high density urban suburb, Temeke Municipality, in Dar es Salaam, provided the context for our study. (*See Box 1 for background information on these schools.*) This included a residential special school for physically disabled children which was offering its resources and expertise to the inclusion initiatives, and four primary schools, one of which had a special unit and another was a resource base for itinerant teachers of visually impaired children.

There was a total of 9,925 girls and boys, 481 of whom were identified as having a range of physical, sensory and intellectual impairments. However 192 of these disabled children attended the special school and so the total number of disabled children attending the four primary schools, including the special unit, was 289 out of a total school population in the four primary schools of 9,729. This gives a figure of just over two per cent of the school population identified as having an impairment. The total school population (and those identified as having impairments) involved in the study was very similar to that in Zambia, but it was spread over a much smaller number of schools. This gives some indication of the overcrowding in the sample of Tanzanian schools compared to those in Zambia.

The lead internal facilitator was an independent Tanzanian consultant with over 20 years experience of working as a teacher, adviser and researcher in the field of special and inclusive education. He was joined mid-way through the study by another independent Tanzanian consultant – a woman with a similar professional background. The research committee represented a wide range of stakeholders and interest groups, not just the school representatives. They included: disabled people, university staff, representatives of the Ministry of Education and the national parents' organisation, TAMH. Inviting such a wide range of people to be members of the committee was a deliberate strategy to engage potentially influential stakeholders in the study.

The MoEC initiated an inclusive education project in 1997. Initially the project only involved two schools in Temeke, Dar es Salaam – Wailes and Kibasila. The schools were selected by the district education office because of their specialist expertise. One of the schools has a special unit, and the other school is a resource base for itinerant teachers of blind children. The schools were also situated close to the district education office, to enable them to be monitored easily.

The Salvation Army special school in Temeke later joined the programme and began to support inclusive practices in two nearby primary schools, Mgulani and Kurasini. The aim was to introduce more inclusive practices into the residential special school, (which is primarily for children with physical impairments and serves the whole of Tanzania), and to develop the school into a resource for inclusion in the nearby community. The school has recently been running seminars for teachers and constructing toilets and pavements to ensure the two schools are barrier-free for wheelchair users.

The project was sponsored by UNESCO, who organised the training of a 12-member National Resource Team for two weeks. The consultant and trainer provided by UNESCO was from West Africa and the training was based on the 'Special Needs in the Classroom Resource Pack' (UNESCO, 1993). This was followed by school-based training on effective teaching, in which a total of 70 teachers were trained. Each of the project schools set aside two experimental inclusive classes which, under UNESCO's instructions, were to have only 35 pupils, five of whom were those categorised as having special needs. UNESCO funding came to an end in 1999, and although UNESCO did not evaluate the programme, the MoEC and the Temeke Municipality continued to support the schools.

The Government of Tanzania is committed to EFA and its 1996 Education and Training Policy calls for schools to adopt the whole school development planning approach. The Comprehensive Basic Education in Tanzania programme, developed in order to implement the Education and Training Policy, includes the provision of an intensive two-year primary education programme for 13-16 year-old children who have dropped out of school, or missed out altogether. This is an inclusive programme which includes children described as being in difficult circumstances, such as street and other out-of-school children, and adolescent mothers.

UPE was re-introduced in January 2002 under the donor-funded Primary Education Development Plan. As part of the recent policy initiative, school fees and other parental contributions were abolished, education funds began to be devolved to districts, and schools and enrolment targets were set and have been surpassed. To accommodate rising enrolment levels, schools have adopted a system of double shifts, large schools have been split into smaller schools and new classrooms have been built.

Although the current policy context in Tanzania is conducive to the promotion of more inclusive practices in education, and in recent years there have been

conscious efforts towards developing inclusive education practices, including disabled children, there is still no consistent national approach.

3.2 Mpika, Zambia

The study focused on 14 school communities in and around the small town of Mpika in the Northern Province. Two of the schools involved in the study had special units attached to them, one for deaf children and the other for children with learning difficulties. The study was led by a primary school teacher, with no specialist training in the field of special or inclusive education, with the support of the Mpika Inclusive Education Programme (MIEP) Co-ordinator.

There was a close association between the teachers involved in the study and those involved in the MIEP, which is operational in 17 schools, 12 of which were involved in the study (*see Box 2 for information on MIEP*). Since this study was primarily focused on processes, and attempted to avoid focusing exclusively on disability and 'special needs' issues, there was no collection of data on numbers of disabled children. However, according to MIEP data, in mid-2002 the programme involved approximately 200 disabled children, including those in the special units), out of a school population of 10,387 (5,023 girls and 5,364 boys) (Child-to-Child Trust, 2003). Just under two per cent of children in the schools were therefore formally recognised as being disabled, or as having difficulties in learning. Clearly many children still remain at home, or unidentified.

The lead internal facilitator was a primary school teacher, with no specialist training in the field of special or inclusive education, or in research methods. In addition to his part-time teaching post, he also had in-service training responsibilities in 12 schools within the district. He worked in close collaboration with the Co-ordinator of the MIEP, who acted as a second facilitator for this study. The Mpika research committee consisted of teachers, including one head teacher, and it had a good gender balance. Initially the research committee had consisted of the MIEP planning committee, which included not only teachers, but also community members. However, with the formal separation of the two projects (see below), an independent research committee of 12 members (all teachers) was established for the study. The committee represented the six schools which were most active in the study and was led by the internal facilitator. In addition to this central research committee, which had a co-ordinating role, there were school-based monitoring committees in each of the participating schools, usually consisting of about three members, all of whom were teachers.

The study built upon the foundations laid by MIEP and embarked on the first action research activities in six of the MIEP schools, including the two schools which had special units. It later expanded to a total of 12 schools; two of which were rural community schools that had never been part of MIEP.

Although the study was able to build on the substantial work already carried out under the MIEP initiative, a decision was taken not to inform the teachers that this was a separate research project, funded and co-ordinated by a

different organisation. This was a decision with ethical implications which was left to the judgement of the internal facilitators. They felt that the introduction of another externally funded project, based on the inclusive education initiative, would confuse the teachers. It is likely that the internal facilitators would have found it too difficult to articulate the detailed aims of the action research study in the early stages, as it was in the very nature of the study that these aims were developed collaboratively over time. Such a decision was only possible because it was made by the internal facilitators who, as insiders, were familiar with the existing programme and the current levels of understanding, involvement and commitment of the teachers.

Mid-way through the study, when there was greater clarity about the action research processes and intended outcomes, this decision was reversed. It was explained to the teachers that there was a separately funded study with different objectives from the MIEP. This announcement did not cause any problems, as by this time there was a clearer demarcation between the study and the MIEP. The two had come to be seen as complementary, and the word 'research' came to be used by most of the teachers – including those involved in the MIEP – and it was reported that the teachers felt proud to be associated with research.

Box 2: The history of inclusive approaches in Mpika district

Mpika has a unique history of implementing Child-to-Child methodology,[1] dating back to 1986. The Child-to-Child work in Mpika has focused on health education, child rights, and the introduction of more democratic practices in classrooms. Initially the training of teachers in the Child-to-Child approach was supported by the Institute of Christian Leadership in Mpika, but the approach has now become self-sustaining at school level.

Child-to-Child methodology was first applied to the issue of disability in 1997, when pupils from the special unit attached to Kabale Basic School were twinned with pupils from the main school. The aim of the 'Twinning for Inclusion' project was to break down the social barriers between these two groups. The concept of twinning – pairing non-disabled and disabled children together to provide mutual support – played an important role in the subsequent development of the MIEP.

MIEP was supported by the Child-to-Child Trust in the UK, with funding from Comic Relief from 1999-2002. In 2002 responsibility for the programme was handed over to the schools. The co-ordinator of MIEP was a former teacher, with responsibilities for community schools and for Child-to-Child work in the Mpika area. The programme initially only involved three schools, two of which had special units, but later expanded to 17 schools.

Policy development in Zambia is clearly moving in an inclusive direction. The Government of Zambia has a policy of integrating children identified as having special needs into ordinary classrooms (Ministry of Education, Republic of Zambia (1996). The policy states that their needs will be met by 'training an adequate number of teachers in special education' and 'designing appropriate curricula and providing special equipment' (ibid. p.69). The Inclusive

Schooling Programme (INSPRO) has been introduced as one of a number of curriculum reforms. INSPRO has been piloted in several districts in the country and aims to expand to all districts in Zambia. Inclusive education is seen as being an approach to the education of disabled children and those with difficulties in learning. Although the policy documents provide a lot of information about the identification of such children, they give no real practical advice on how to teach the children once they have been identified. The practical implications of this policy are considerable in terms of teacher education, teaching and learning methodology, and initiating and sustaining change at school level.

Notes

[1] Child-to-Child is an approach to health education and primary health care promoted by a worldwide network of health and education workers, and co-ordinated by the Child-to-Child Trust, which is based in London. The objective of the Child-to-Child Trust is to protect and preserve the health of communities worldwide by encouraging and enabling children and young people to play an active and responsible role in the health and development of themselves, other children and their families. (The Child-to-Child Trust, 2003) See website www.child-to-child.org/about/index.html (last accessed 8 December 2003).

4
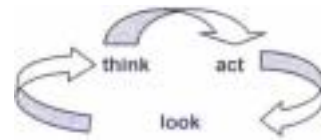
Developing a methodology

So far we have outlined the agenda of the study, locating it within international efforts to improve participation in education, particularly amongst traditionally vulnerable groups, such as disabled children. We have explained that the main purpose was to develop ways of helping practitioners within particular contexts to analyse and document their experience of promoting more inclusive practices in education. With this in mind, the study focused on the following overall questions:

- How can people with different knowledge, skills and perspectives be helped to think about, document and learn from their efforts to address barriers to the learning and participation of all children?

- What needs to happen to make this process empowering, particularly for practitioners and people from marginalised groups?

- How can the particular experiences of one community speak to a wider audience, and at the same time remain authentic?

- How can 'insiders' and 'outsiders' best work together to improve practice?

In this chapter we explain how the methodology for the study was developed by a team of facilitators in Tanzania, Zambia and the UK. We also describe and illustrate a variety of activities that were used to encourage the sharing of ideas in groups, and explain how efforts were made to involve different stakeholders. The study was carried out by small teams of what we will refer to as 'internal facilitators', who worked with stakeholders in education in Tanzania and Zambia. Their activities were supported, mainly at a distance, by the Manchester-based team, referred to hereafter as the 'external facilitators'. Finally, we describe the roles of the internal and external facilitators.

4.1 Collaborative inquiry

As we explained in Chapter 2, the field that has been known as special education or, more recently, special needs education, is involved in a period of considerable uncertainty. This context of uncertainty provides the special education field with new opportunities for continuing its historical purpose of representing the interests of those learners who become marginalised within existing educational arrangements. At the same time, many of the assumptions that have guided special education practice are no longer relevant to the task (Ainscow 1999).

It can be argued, therefore, that the current emphasis on inclusive education is but a further step along this historical road. It is, however, a major step, in that the aim is to transform the mainstream to increase its capacity for responding to all learners. And, of course, such a project requires the participation of many stakeholders in ways that challenge the status quo.

The work of the external facilitators attempts to contribute *directly* to thinking and practice in relation to such developments, at the classroom, school and systems levels. For many years we have worked closely with educational practitioners in different countries, including the UK, as they have attempted to move towards more inclusive ways of working. Acting as co-researchers and critical friends, we see our task as helping them to learn from their experiences and, in so doing, to point to patterns and examples of practice that might be instructive to others who are addressing similar agendas. In this sense our aim is not to propose recipes that can be applied universally but rather to suggest ingredients that might be worthy of further consideration within particular contexts.

Previous research carried out by the external facilitators has involved a search for forms of inquiry that have the flexibility to deal with the uniqueness of particular educational occurrences and contexts; that allow social organisations, such as schools and classrooms to be understood from the perspectives of different participants, not least children themselves; and that encourage stakeholders to investigate their own situations and practices with a view to bringing about improvements (e.g. Ainscow et al 1995; Ainscow, Barrs and Martin 1998; Ainscow 1999; Ainscow et al 2003). It has involved the use of action research, an approach to inquiry that in its original form sought to use the experimental approach of social science with programmes of social action in response to social problems (Lewin 1946). More recently action research has come to refer to a process of inquiry undertaken by practitioners and other stakeholders in their own workplaces. Here the aim is to improve practice and understanding through a combination of systematic reflection and strategic innovation (Kemmis and McTaggart 1982).

In developing the approach used in this study we were keen to pursue a participatory orientation, along the lines of what has been defined as 'collaborative inquiry' (Reason and Rowan 1981; Reason 1988). The use of such approaches emphasises the value of group processes and varied methods of recording. Here our thinking was influenced by the experience of using collaborative inquiry methods in English schools (Ainscow 1999); and by approaches developed for use in countries of the South, such as participatory rural appraisal (PRA) – now referred to as participatory learning and action, PLA – as developed by Chambers (1992) and refined by Stubbs (1995) and Ainscow (1999) for use in educational contexts.

From these earlier experiences we found it useful to take account of four principles as we sought to involve others in the research process. These were that it should:

- be of direct help to people in the contexts involved

- demonstrate rigour and trustworthiness such that the findings are worthy of wider attention

- contribute to the development of policies and practices elsewhere

- inform the thinking of the external facilitators.

The methodological approach developed within this study can be characterised as a process of social learning. It involved groups of stakeholders within particular contexts engaging in a search for a common agenda to guide their enquiries and, at much the same time, a series of struggles to establish ways of working that enabled them to collect and find meaning in different types of information.

Such an approach requires members of a group to be exposed to one another's perspectives and assumptions. We believed that this would provide opportunities for developing new understandings about how to make educational contexts more inclusive. However, from the outset we were aware that there would be obstacles that would have to be addressed in order to put such approaches into action. In this sense it was clear that everybody involved in the study would have to regard themselves as learners.

4.2 Planning the action research

In planning the study, we took account of the lessons of these earlier experiences. In particular, we set out to develop an approach that involved those within a community – such as a school or group of schools – collaborating with 'outsiders', using their different skills and perspectives in order to collect and engage with evidence in ways that would have a direct and immediate impact on thinking and practice. Our assumption was that such an approach would be particularly important in relation to the development of inclusive practices. We saw this as being essentially about those within a given context learning how to work together in order to identify and address barriers to participation and learning experienced by members of their communities.

Our overall purpose in carrying out the study was, therefore, to explore how people can be helped to think about, document and learn from their own experiences in order to improve access to learning, particularly for vulnerable groups of learners. In taking the work forward we also started from the following assumptions:

- By bridging the communication gaps between oral and written cultures, effective learning about educational practice will be improved across cultures.

- It is more relevant and useful for good practice to be exchanged between similar cultures and contexts, rather than the continued exportation of inappropriate models from the richer countries of the North.

- Developing analytical and writing skills within a community will promote moves towards more inclusive practice.

The programme of action research was carried out by small teams of internal and external facilitators. We were aware that the relationship between these two groups was crucial to the success of our work. We were also conscious that, in electing to adopt participatory approaches to inquiry, it was important to recognise that these would take on very different forms as a result of the influence of particular cultures.

In this respect the actual frameworks and methods adopted may not be the most significant factor. Rather, as Chambers (1992, preface, cited in Stubbs, 1995) notes, 'the behaviour and attitudes of outside facilitators are crucial, including relaxing not rushing, showing respect, 'handing over the stick', and being self-critically aware'.

At this stage it is important to recognise the somewhat unusual nature of the methodology developed within the study. In practice, it was both an intervention, carried out in partnership with colleagues in the field, and, at the same time, it was our main strategy for collecting and analysing evidence in relation to the overall research questions.

With this in mind, the design of the study can be summarised in the following diagram (*see Figure 3*). As can be seen, the procedures developed within the study involved two interconnected cycles of activity. It is important to stress that this formulation emerged from the experiences within the study and presents an overly rational impression of what, in practice, was a complex social process. Nevertheless, at this stage it provides a useful map for explaining the key elements of what happened in the two countries.

Figure 3: Action research cycles
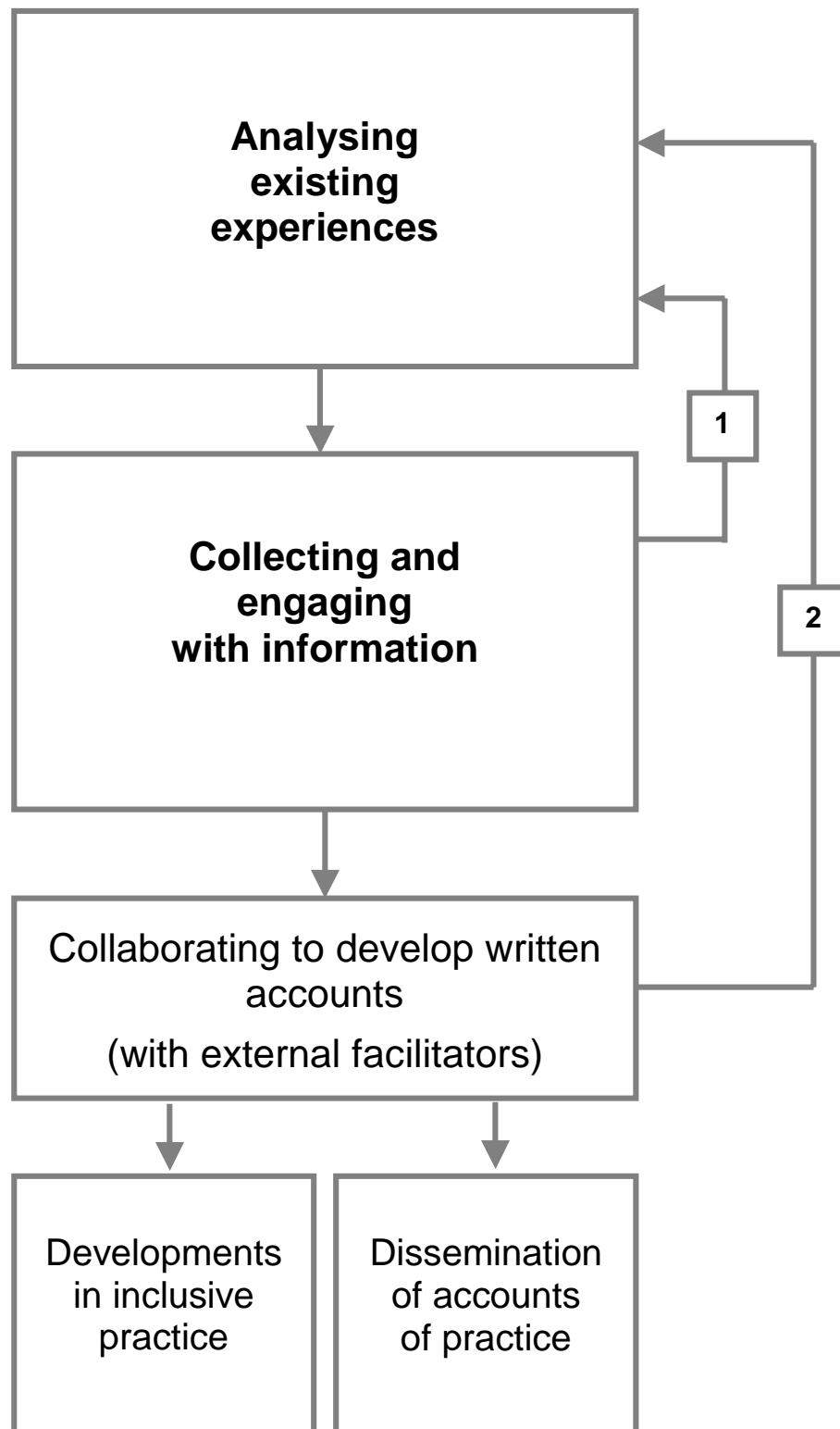
Cycle 1 involved groups of research participants (teachers, students, family members) within a given context (usually a school), coming together to share their experiences of trying to make education more inclusive, using frameworks and guidelines provided by the external facilitators. Here the aim was to help those involved to consider their different ideas and to develop deeper understandings. Within these processes the role of 'outsiders' (e.g. researcher facilitators, administrative staff, visitors) was to support 'insiders' (i.e. those who are members of the particular community) in reflecting and learning from their experiences.

Cycle 2 focused on the development of written accounts of attempts to make education more inclusive. The research participants looked at what had happened and what could be learned from these experiences, with the support of the internal facilitators. The intention was that those involved would deepen their understandings in ways that would further strengthen activities, whilst, at the same time, developing accounts that would be of value to readers in other cultures and contexts.

Given the aims of the study, there were two main intended outcomes. First of all, we were keen to see if there was any evidence that involvement in the process would lead to changes in thinking and practice. From the outset we were conscious that any progress in this respect would be difficult to determine, not least because of the limited resources and timescale available to the study. Nevertheless, we remained committed to the idea that such an approach did have the potential to make a direct impact and we looked for evidence to support this viewpoint. The second of the intended outcomes focused on the generation of accounts that could be disseminated to practitioners, in other parts of the world, who were also attempting to develop more inclusive forms of education.

In the following sections we use examples of what happened in the two countries to illustrate the kinds of approaches used in relation to the two inter-connected cycles of activity. In this way we draw attention to the social nature of the learning processes involved, commenting on the different roles played by internal and external facilitators.

4.3 Getting started

In essence there were five key elements to the action research approach that was adopted. The order in which they are presented is, however, of no significance.

4.3.1 Introduction of guidelines

The external facilitators began by developing a set of draft guidelines for the internal facilitators, building on the previous work referred to earlier in this chapter. These provided the basis for workshops that introduced participatory methods and activities to help internal facilitators work with colleagues in helping them to think more deeply about their own situations. Through evaluating these activities we expected that the guidelines would

subsequently be re-written. The revised guidelines are available from EENET, and they will be further developed as part of the dissemination phase of the project (EENET 2003a).

The initial guidelines were structured around the following sets of questions:

What are the barriers to children's participation and learning?
- What knowledge already exists?
- What type of additional information do you need?
- How will you collect it?

How can the barriers identified be addressed?
- What strategies have already been used?
- What other strategies might be useful?
- How can these be introduced?

Who needs to be involved?
- Who has been involved so far?
- Are there others who might contribute?
- What actions are needed to strengthen involvement?

As the study progressed we added the following questions:

How can we describe and share what we have been doing?
- What have we learned about moving our school forward?
- How can we tell the story to people elsewhere?

How can we evaluate what we have been doing?
- What has worked well?
- What will we do differently next time?

What should we do next?
- What are the implications for our school?
- What actions are needed?
- Who is going to take the lead?
- Who is going to do what – and when?

There are, of course, many overlaps between the above steps. All the steps need to be discussed prior to embarking upon such a process of collaborative inquiry. They are all important, but they need to be carefully adapted to each situation.

Midway through the study, we introduced a new, though similar, framework to the internal facilitators. This enabled them to ask teachers, children and family members to assess the following aspects of inclusion in their school communities:

- **Presence:** Who attends, and who does not attend? Why?

- **Participation:** Do children feel valued and are they active learners?

- **Achievement:** Are the children making progress in their learning?

At the same time, the guidelines offered the following advice to groups in formulating their plans for taking the work forward:

Make use of existing knowledge
- Remember people already know quite a lot.

Listen to different voices
- Listen to what people have to say, particularly the children.

Maximise participation and communication
- Keep *everybody* involved.

Ensure accessibility
- Check that everybody can see, hear and understand. Use observation. Look closely to see what really happens.

Challenge taken-for-granted assumptions
- It is helpful to question what is said.

Develop a strategy for leadership
- Decide who will help to make things happen.

4.3.2 Guidelines used to share ideas and write initial accounts

The intention was that the internal facilitators in each country would use the guidelines as starting points for activities in schools and communities in their districts. Visual methods for use with groups in sharing their experiences and ideas, such as mind-mapping, etc, were suggested. It was recommended that these should be adapted to suit particular settings, that they should also be made accessible to disabled and non-disabled people. Underpinning the use of the recommended methods was a strong ethical principle of respect for all the stakeholders and an approach that aimed to catalyse people's ability to analyse their own experience, rather than to extract information for use by outsiders. It was noted that interviewing and questionnaires might not be appropriate, unless the person being interviewed, or responding to the

questionnaire, was actively learning and benefiting from the process. More empowering methods were those that stakeholders could use directly themselves after being introduced to them.

4.3.3 Outsider perspectives provided by external facilitators

As far as possible the external facilitators kept in touch with the internal facilitators, who were responsible for taking the programme of activities forward in their districts. On two occasions (2001 in Tanzania; and 2002 in Zambia), members of the team were able to join the internal facilitators in activities in the field. Otherwise, as far as possible, regular contact was maintained by post, telephone and email. The participation of the external facilitators was intended to strengthen these activities by providing guidance on methods of inquiry and technical support in recording and reporting conclusions, while at the same time helping to overcome some of the limitations associated with action research.

4.3.4 Further accounts written

Throughout the study the aim was to encourage those involved to challenge one another's thinking in ways that were meant to lead to a deeper analysis of thinking and to draw attention to overlooked possibilities for moving practice forward. The intention was that social processes, facilitated by collaborative writing, would help to facilitate such developments.

4.3.5 Accounts published and disseminated

The written outputs were edited, organised thematically and produced as a document by EENET. They were then disseminated locally and internationally. The document, 'Researching our Experience' (EENET, 2003c) has provided a focus for further reflection.

4.4 Moving into action

In each country there were two internal facilitators. Box 3 provides a timeline of the action research activities they carried out in their communities. In reading the timeline, it must be noted that what happened in the two countries did not move along in a linear fashion. In practice, we found that our plans had to be continually modified in relation to unexpected events. We also found that links between the teams of internal facilitators in the two countries provided possibilities for learning that we had not anticipated in our original plans. At the same time the changes and adjustments that we were forced to make threw further light on the difficulties involved in putting into practice the ideas we had in mind.

Box 3: Timeline of activities

Date	Tanzania	Zambia
Jan-June 2001	Conceptual development: reading, reflection, UK meetings to refine research questions	
July 2001	Workshop held in Dar, led by external facilitators from Zambia and the UK. Collaborative research design	
Aug-Oct 2001	Setting up research committee Visiting schools	Use of audio and video tape to record discussions, interviews, classroom practice, parents' meetings
Nov-Dec 2001	Beginning of administrative delay and communication difficulties	Preparation of teachers' case studies and analysis of problems faced in Mpika schools
Jan 2002	Free education introduced in Zambia and Tanzania	
Mar 2002	Research resumed in close collaboration with national parents' organisation, TAMH, and a second internal facilitator became involved	Lead internal facilitator visited UK.
Apr-June 2002	Research committee re-established	Preparation for July workshops
July 2002	Visit to Mpika by external facilitators and facilitators from Tanzania; research team and teachers' workshops	
Sep 2002	Planning continues for workshops	Facilitator becomes an assistant in-service provider for 7 schools.
Oct 2002		Facilitators support teachers in the writing of 'accounts'.
Nov 2002	Facilitators have difficulty gaining access to schools Meetings with senior officials in the MoEC to raise awareness about the study, and to regain access to schools	36 handwritten teacher accounts produced by teachers and sent to the UK Facilitators have serious email problems
Dec 2002	Final plans made for workshops to be held, Jan-Feb 2003	Teachers' accounts completed
Jan 2003	3 workshops held in Dar for 5 schools and wider stakeholders	Intense emailing between UK and internal facilitators to discuss data analysis
Feb 2003	Writing workshops held in Dar	
Mar 2003	Workshop reports completed Stories written in KiSwahili	Production of 'Researching our Experience' by EENET

Bearing this timeline in mind, we provide below illustrations of what happened in the two countries. We also explain and illustrate some of the approaches used to encourage practitioners to analyse and reflect on their practice, and to develop accounts of their efforts. We draw attention to the way that distinctive factors in the two contexts, and, indeed, the unintended links between the activities in the two contexts, influenced what happened.

In the Zambian schools there was already some evidence of a culture of group problem solving. This culture was largely because of a long history (since 1986) in the district of promoting child-to-child methodology and, therefore, of being open to change and to listening to children. There was also government support and encouragement for teachers to have regular teacher development sessions, through the use of 'teachers' group meetings'.

The initial guidance notes and activities provided an additional impetus and sharper focus for these ongoing teachers' meetings, which encouraged teachers to look to each other as a source of support in solving problems. This seemed to fit easily into the ongoing teacher development activities, in which the internal facilitators played a central role in their capacity as in-service providers.

However, the situation in Tanzania was quite different. There, initial discussions with the teachers and school committee members indicated that they felt their problems were insurmountable, and that inclusive education could only be implemented if they had specialist expertise from outside. The internal facilitators were not members of the teaching staff in the schools (unlike in Zambia), and so it was more difficult for them to have ongoing influence on the way teachers discussed and shared their expertise. However, given a supportive atmosphere, the teachers were able to engage in discussions and share their ideas and experiences.

In both countries we found that teachers often needed support in moving from group problem solving, to developing the necessary skills to become reflective practitioners, and in particular, in documenting the reflective process. Nevertheless, we did collect many examples that seemed to suggest that this was happening. For example, in a collaboratively written account, entitled 'Teacher Co-operation', a group of teachers from one school described the way that they had successfully come to see each other as resources on which they could draw:

> 'At our school, teacher group meetings play an essential role. In these groups, teachers discuss matters affecting their work. Topics or areas of discussion are not dictated to the groups. Groups brainstorm and thereafter classify and prioritise their topics…
>
> Lesson demonstrations are also carried out in teacher groups… Pupils have also been involved in these teacher groups especially in lesson demonstrations.

All the strategies that have been put into place in improving our schools are as a result of co-operation among teachers and the co-operation between teachers and the school administration. All in all the school sums up its strategies as centring on the school, that is teachers and pupils and the community. Lack of community involvement in school activities means a negative attitude toward the school, which is full of their children and their teachers. The school has therefore brought the three parts together through the PTA [parent-teacher association] and the introduction of Family Pac which incorporates parents into helping their children with the schoolwork.'

The process of teacher reflection began with the use of an open-ended approach to barrier analysis, which encouraged teachers and other stakeholders in education to ask questions about who is excluded, or not participating, and why. In some schools teachers became involved in observing each other teaching and this was followed by one-to-one discussions about teaching styles and methodology. With the encouragement of the internal facilitators, one or two teachers took responsibility in each school for leading the process of reflection and analysis of barriers to learning and the promotion of inclusive practice.

The teachers found the following analysis form useful in the process of self-reflection. It was adapted from a form used during the first writing workshop in Tanzania and was used to record reflections and activities (*see Box 4*). For some teachers, though, it became seen as a template for their later written accounts. In this sense the form was potentially prescriptive and possibly narrowed the teachers' thinking, instead of acting as a tool to aid reflection. Many teachers only wrote one sentence under each heading, but some were able to write at length, and despite its drawbacks, the form did provide a useful framework within which to reflect on their activities.

Box 4: Analysis form for teacher reflection

Problem/challenge…

My challenges were to…

My fears were that…

What I enjoyed most was…

What I learnt as a result of the experience was…

What I hope to change as a result of the experience was…

What I think I should do next time to address the challenge/problem is…

In the early stages teacher discussions were tape recorded, usually following observation sessions. This recording was in order to enable further reflection, and to provide an ongoing record of any signs of movement towards more inclusive practices. On other occasions video recording was introduced in order to capture discussions in teachers' meetings and meetings with parents.

> 'I tape-recorded some of their conversation and, when played back, a number of ideas arose. Interviews were held to discuss some of the best practices identified among them. The video documentation was another excitement, as this was revealing the uniqueness of individual teachers as they tried to demonstrate the best practice in their classes, and often this sparked debates to discuss further practice and alternatives.'
> (Email communication from an internal facilitator, 8 February 2002)

In Tanzania the internal facilitators used a set of open-ended questions as the basis for a series of school-based discussions. Participants were drawn from among parents, teachers and pupils, representing the key voices in the school community in the process of whole-school development, school improvement, and inclusive education. The questions used to structure the discussions were adapted from those used in a similar workshop held in Zambia. They were as follows:

1. What do you, individually and collectively, understand by the term 'inclusive education'?

2. What are the things that prevent children from participating and doing well in class, or which cause them to drop out of your school? *(i.e. what are the barriers to children's participation and achievement?)*

3. How do you ensure that children in the neighbourhood attend your school, participate in lessons and achieve results? *(i.e. how have you been trying to overcome the barriers?)*

4. How have you been promoting and implementing inclusive education in your school?

5. How will you overcome these barriers in the near future to make your school more inclusive?

In the workshops that took place in both countries, participants were encouraged to use their imagination in developing their accounts. For example, non-verbal communication methods were suggested for the benefit of children and disabled people. Drawing, play acting, puppets, picture/photograph activities were put forward as alternatives in order to ensure the participation of people who cannot speak or communicate well, but who have contributions to make to the story. Some of these suggestions were taken up by the participants in Tanzania, probably because they were a more diverse group than the groups of teachers in Zambia, and so needed alternatives to written forms of expression. In Tanzania, for example, some of those involved composed poems, cartoons and songs.

4.5 Involving children

It was envisaged that children would be key participants in the process of analysis, reflection and recording. Of course, such participation is not something that is easy to achieve, especially in contexts where children's voices are not traditionally valued or respected, or where there are no mechanisms in place to hear these voices. As Mumba (2001 p.4) states, there are problems associated with introducing democratic practices (like child participation) into African classrooms where, traditionally, 'children are told not to speak without adult permission'.

Our experience was that child participation (like any new concept or approach) cannot be brought in successfully overnight, particularly where underlying attitudes resist the notion of children's right to be heard. In the Zambian district such attitudes were not so evident since the participation of children had already become an accepted feature in the schools. So, for example, teachers had developed the idea of pairing (or 'twinning') non-disabled and disabled pupils to encourage mutual support and reduce the social isolation experienced by disabled pupils (who had initially been taught in a special unit, attached to a mainstream school). Significantly, this approach, both inside and beyond the classroom, was known as 'Twinning for Inclusion'. It involved pupils befriending those children identified as requiring support until they felt confident enough to begin attending their local schools independently. It also involved support for learning in the classroom (Child-to-Child Trust 2003).

Many of the written accounts that were developed of these practices suggest that they had involved changes in attitudes among teachers (away from the traditional views described above), as we see in the following extract from the Zambian teachers' writing (EENET 2003c, p.43):

> 'Pupils are not blank in their heads as we sometimes take them to be. If fully involved by sharing the problem with them, they come up with very good suggestions and solutions hence lifting the teacher's burden.'

One of the internal facilitators in Zambia was particularly committed to the principle of democracy for everyone. In a paper he prepared prior to the EENET project (Mumba 2000) he argued that democracy can only be achieved if everyone has a chance to speak and be listened to, and that listening to children's voices is, therefore, essential. He also suggests that teaching children about democracy will enable them to participate in democratic processes when they are adults. Furthermore he believes that promoting democracy is inextricably linked to promoting inclusive education – both processes involve a change of values and beliefs, not just a change of policy or teaching methods. He commented:

> 'I came to the conclusion that the classroom needed to be democratised so that everyone could learn together.'

(Mumba 2001, p.4)

A Zambian teacher also made the link between inclusion and children being heard:

'Inclusive learning has helped pupils to speak out if they have problems.'

(EENET 2002a, p.42)

and

'Children feel happy and ready to contribute more if their voices are heard and considered.'

(EENET 2003c, p.43)

However, despite this underlying 'preparedness' for child participation in the Zambian research site, the research participants (mainly teachers) found it very difficult to encourage children to have their own debates and conduct action research activities, independently of adults. The teachers did not document their experiences or specific difficulties with regard to involving children in the action research activities. There are, we believe, a number of reasons for this. For example, Mumba (2001) states that the child rights literature in Zambia has not reached all the schools and that although the Government is trying to achieve democracy, there is still little understanding generally about what it means. However, we offer some possible explanations here which could form the basis of future discussions about involving children in such activities:

- Applying what is known or practised in one context to another is not always simple. It may be that the teachers did not have the confidence or depth of experience in child participation through their twinning and child rights activities in class, to apply these concepts to the new set of activities they were engaging in as part of the study.

- It is possible that a commitment to child rights and participation is not yet fully embraced or understood by all of the teachers, e.g. some teachers involved expressed their concern that rights had been 'taken too far'.

- The short name for the action research project was initially the 'Writing Workshops project'. It is possible that a perceived focus on writing their own accounts had distracted teachers away from focusing on involving children and using alternative communication methods to help children express their version of inclusion/exclusion.

- Even with a commitment to children's right to participate, it can still be daunting to put beliefs into practice. The external facilitators could perhaps have offered more support in thinking through not just why children should be involved, but how to involve them. The extent to which the teachers had come to understand child participation as a result of the twinning initiatives had perhaps been overestimated.

- The participants in Zambia were primarily teachers. It is likely, therefore, that they had heavy workloads and were simply too busy to plan and implement a range of activities for children to express their views in the relatively short time available.

Despite the fact that the research participants did not arrange activities solely to help children think about, and express their experience of, inclusion, many did consult children through interviews and class discussions, and they quoted children's words in most of their written accounts. During the visit to Zambia by members of the external facilitation team, in July 2002, there was also a workshop held at an isolated, rural school that had only recently become part of the study, and had not been part of the existing programme to promote inclusion. This was a community school with only two paid teachers. Group discussions were held with pupils, parents and teachers as a first step to thinking about the problems the school was facing and the barriers that some pupils may experience in attending and participating, (prior to raising the issue of disabled children's attendance). Pupils talked about the problems of inadequate school sanitation facilities and poor teaching methods. They spoke enthusiastically and offered insights that were not necessarily the same as those of the adults.

The ability of children to understand and analyse their own educational situation, and, if given the chance, to convey their views, wishes and ideas is often under-estimated. The following quote from a child who objected to his teacher's low expectations demonstrates this:

> 'Here is a case I came across yesterday: One mentally disabled child, after being given a new teacher in a new grade… saw himself being marginalised. The new teacher segregated him by giving him very simple tasks which he later felt he did not like. He complained that he should be given the same tasks as the others in the class, and not an individual work. It took the new teacher to consult the previous teacher of that child to explain exactly how she was teaching him and that solved the problem. That child does not want to go back to the unit because there is no real socialisation. The child does the same tasks and even amazing responsibilities in the community, only to find himself marginalised in school. He refused!'
>
> (Email communication from an internal facilitator, 26 March 2003)

Many of the teachers and pupils in Zambia were, in our view, at a stage where it should be possible to increase the involvement of children and young people in action research activities. With the right support the children could make valid contributions to the analysis, reflections and outputs of the research process. The Zambian team was conscious that they needed to work harder on this and decided to include it as a priority in their future plans.

In the series of seminars and workshops held in Tanzania in early 2003, the internal facilitators insisted that participating schools should ensure that six pupils from each school attended. They later reported:

> 'One school, Kibasila, decided to involve children with intellectual disabilities in the seminar. The six children, from Grades 3-5, had not yet acquired reading and writing skills. These children were paired with the more able pupils from Wailes and the pairs were assisted to work together.'

In response to the fact that one of the schools sent children with learning difficulties as their child representatives at the workshop, the internal facilitators decided to use the principle of twinning which they had seen in action in Zambian schools. They paired the children with peers from another school and this ensured their participation.

It was also reported that in the focus groups these children were able to offer interesting insights, often providing perspectives on education that were not the same as those of the teachers and parents. For example, in answer to the question 'what are the barriers to children's learning and participation', there were several references in the pupils' focus groups to their fear of teachers. The pupils also mentioned indiscipline in class and economic hardships, neither of which were mentioned by the parents or the teachers. More specifically, some of the pupils highlighted the fact that the teachers gave unreasonable punishments, without first listening to the pupils. The teachers also acknowledged that some of their colleagues were unfriendly and dictatorial. All of this suggests that it was important that the pupils were given separate opportunities to express their feelings and experiences to each other, and not in the presence of the teachers.

4.6 Involving parents

In the same way that the teachers in Zambia quoted children's words in their accounts, they also quoted the responses made by parents to their questions and the comments they made during formal meetings, discussions and home visits. Parents' involvement in the action research process in Zambia was therefore similarly very limited.

In Tanzania, by contrast, there was a much greater effort made to involve parents as equal participants in the action research activities, and in the research committee that was formed. Such school committees play a major role in the life of the school community in Tanzania, and where they work well, they seem to be more effective than the more traditional parent-teacher associations, since they have representatives from the community, and not only those with a direct interest in the running of the school. It was perhaps easier for the two Tanzanian facilitators to bring together the various stakeholders and key players, since their status was largely that of 'outside' facilitators.

In contrast, the Zambian facilitators were both insiders and teachers. Therefore, they had a much stronger bias towards, and vested interest in, the involvement of teachers in action research. They also had strong working relationships with them, and had a particular role to play in teacher education and development. Undoubtedly, this had an influence on the way the project developed in their context.

Perhaps one of the most significant differences between Tanzania and Zambia regarding parents' involvement in the research was the fact that the Tanzanian facilitators had institutional links with the national organisation for parents of children with learning difficulties, TAMH. Indeed, members of the

organisation were directly involved in the research committee, and its offices were used as an administrative base. This meant that there were greater opportunities to listen to parents' views.

On the other hand, as with pupil participation, it was noticeable that involving parents was not straightforward. We found that parents were not necessarily used to being involved in their children's education, or, indeed, in school matters more generally. In fact, many of the accounts written by the Zambian teachers during the early stages of the study were very critical of parents' lack of interest in their children's education. This sometimes uneasy relationship between parents and teachers would merit further exploration in the Zambian context.

We listened to one parent who was extremely happy with the way her daughter was being educated. She expressed no desire to meet the parents of other children with Downs' Syndrome or other learning difficulties. Yet in many other countries, parents of disabled children have organised themselves in support, advocacy and lobby groups in order to ensure that their children have equal access to health, education and social services. Recently EENET produced a publication devoted to the stories of family-based advocacy groups in seven contrasting countries in order to encourage family members, and parents in particular, who might want to campaign for inclusive education (see EENET 2002b).

As we have explained, the study involved an exploration of relationships between what we have called 'insiders' and 'outsiders', and also internal and external facilitators. One of our initial research questions addressed this issue by asking how insiders and outsiders could best work together to improve practice. However the boundaries between insider and outsider were far from clear in this study and they changed over time. Emphasising the different perspectives of insiders and outsiders helped to keep all the facilitators mindful of the unequal power relationships between members of the team. However the research question was designed to look beyond power issues at ways in which outsiders can work strategically with insiders to improve practice through collaboration.

There are strategic occasions when outsiders are able to make a greater impact on the process of educational change, even though the insiders are responsible for the day-to-day practice. They can also provide essential support and back up for the agents of change in an educational setting, as the following quote from a head teacher in Zambia highlights (EENET 2002a, p.42):

> 'The teachers respond better sometimes to ideas that come from outside and not just from the head teacher.'

At times the insider-outsider relationships became uncertain, particularly for those who took on the task of internal facilitators. On some occasions they were clearly seen as being part of the school and community, working on the inside alongside other members of the community and speaking the same

language. On other occasions it became evident that they were perceived to be taking a stance that seemed to distance them from stakeholders, particularly when they were visiting schools in the other participating country. In the same way, there were education officials who might have seen themselves as insiders, but who were seen to be outside the circle.

The ambiguity of roles within the Zambian context is illustrated in the following account written by one of the internal facilitators:

> 'At one time we gave an opportunity to enrol more girls in grade one but the number kept on reducing as the young were being married off by their parents who have placed marriage a priority in their community. When we tried to advise against early marriage we fall out of the community's favour. Moreover, when our superiors from Lusaka visit us to evaluate our work in schools they first meet the local chief and the villagers who give a negative report about us since we have differed on the girl child education, and they simply report we are not serving their community well. This makes us to work in fear to support the girl child.'

(Email communication, 4 June 2003)

There was less ambiguity, however, about the role of the external facilitation team from the UK, who were seen as outsiders and who also carried the role of 'experts'. Yet, the international research team as a whole became an insider group with its own inside knowledge of the study, despite the fact that it consisted of internal and external facilitators.

As we have noted, working collaboratively with internal facilitators in two neighbouring countries provided opportunities to develop links between the two research sites, although that had not been part of the original plan. For the two teams, it meant that the familiar was made unfamiliar in ways that had the potential to challenge existing assumptions and draw attention to overlooked possibilities for moving practice forward.

When the Zambian facilitators visited Tanzania, for example, they were exposed to in-depth discussions about the issue of inclusion in an unfamiliar context. Playing the role of facilitator in a neighbouring country also provided them with opportunities to reflect on their work together, and to begin to plan the way in which the project should be designed and set up in their own district. They were also put in a position where they had to articulate their own work to a range of unknown audiences. This process provided opportunities for further reflection and analysis. The Tanzanian teachers also welcomed the opportunity to ask questions of colleagues from a neighbouring country about the way they interpreted inclusion in the context of large class sizes and few material resources. This dialogue about the Tanzanian and Zambian contexts was helpful in ensuring that participants did not get too absorbed in querying the UK's approach to inclusive education, which would have been less relevant to their situation.

4.7 Learning from the experience

In trying to make sense of all this complexity and uncertainty, we focused specifically on the following factors:

In terms of processes
- the activities and processes that helped groups of people to analyse and write about their experience of trying to make education more inclusive. These include the use of images, the production of written accounts and the collaboration between internal and external facilitators

In terms of outcomes
- the extent to which such activities led to the introduction of more inclusive practices – some examples are given in the excerpts from the teachers' accounts.
- the usefulness of the accounts of these activities to practitioners in other contexts who are interested in the development of inclusive education

In terms of implementation
- the particular history and conditions associated with these outcomes, which leads to successful implementation – shared understandings of the issues, enlightened leadership and comprehensive policy documents.

With these themes in mind, the external facilitators worked closely with the internal facilitators to collect and analyse evidence. A central strategy in this respect was the use of 'group interpretive processes' as a means of analysing and interpreting evidence. These involved an engagement with the different perspectives of 'insiders' and 'outsiders' in ways that were intended to encourage critical reflection, collaborative learning, and mutual critique (Wasser and Bresler 1996).

This approach raises some methodological concerns, however, not least about the dangers of what Schon (1991) refers to as 'vicious circularity'. In other words, how can those of us who read accounts of the research be sure that we have not simply selected and analysed evidence in order to confirm what we already believed. This being the case, we felt it essential in this chapter to articulate some of the key assumptions that influenced our involvement, and to keep these under review.

The issue of trustworthiness was a particular challenge to the form of action research we used. More specifically, we had to be clear about what constitutes 'rigour' within such an approach. Commenting on this issue, Schon argues that without a serious effort to make clear what is meant by rigour, action research 'becomes an open sesame to woolly-headedness, a never-never land where anything goes' (ibid., p.10). He goes on to suggest that appropriate rigour in the reflective study of practice should focus on validity

(e.g. how do we know what we claim to know?) and on utility (e.g. how useful is the research to practitioners?).

As we have explained, the approaches we used to explore aspects of practice generated evidence and ideas in a variety of forms, many of which involved verbal accounts. A strategy that we found useful in exploring the significance of such evidence was that of 'triangulation', an approach that is familiar to social science researchers. Three forms of triangulation were found to be relevant. These involved: comparing and contrasting evidence from different people within a particular context (e.g. teachers, parents and students); scrutinising events from different angles by making use of a variety of methods for collecting information; and using 'outsiders' as critical friends.

In the chapters that follow we examine the accounts that were generated in the two countries, and explore in greater detail the process which led to the generation of these accounts. We also draw on the interpretations of those colleagues in the two countries who took on the roles of internal facilitators.

As Figure 3 showed, the action research process began with an analysis of existing experiences and the development of methodologies by outsiders to promote reflection and analysis by insiders. Already in this chapter we have referred to some of the ways in which reflection and analysis were encouraged, and the way information was collected and engaged with. In the following chapter we focus on the way images were used to promote reflection, and in particular, the use of photography, video and mind-maps. In Chapter 6 we focus on the written accounts produced by teachers, and in Chapter 7 we look in more detail at the collaborative relationship between the internal and external facilitators and the importance of clear and accessible communication in all aspects of the study. The final chapter draws together the issues raised throughout the report and the implications for moving towards more inclusive policy and practice in the future.

5
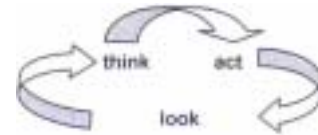
Using images to promote reflection

One of the main principles upon which this study was based was a commitment to supporting practitioners to *analyse their experiences* as a pre-requisite to introducing changes in educational practice. In this chapter we report on and discuss the way in which image-based approaches to reflection and analysis were used in this study to complement the talk and text based methods described in the previous chapter. We highlight the advantages of using images, while appreciating that there are limitations to their use. Where they have been used successfully, we attempted to exploit their full potential.

Here we reflect on the way photography, video recording and mind-maps were used, both to create visual images for the purposes of recording and reflection, and to provide a stimulus for further reflection. Since the concept of inclusion has been the focus of so much controversy and disagreement internationally – particularly in relation to meeting the educational needs of disabled children – it was important that the Zambian and Tanzanian research participants had the opportunity to reflect on what the concept meant to them in their context. Image-based reflection was one of the most promising ways in which participants in this study were able to reflect on their existing understanding and experience.

Capturing and conveying an image of an inclusive classroom, or an inclusive society, is extremely difficult since inclusion is concerned with equity, social justice and human rights. Such abstract concepts cannot easily be visualised or portrayed through images. The more practical classroom-based implications for promoting inclusion, however, include child-centred teaching methods and catering to the individual needs of children who have impairments which affect their learning. In some cases these can be captured in images and used to promote reflection about the meaning of inclusive education.

There are some inherent and well-acknowledged difficulties in using images and photographs to show that disabled children are included within a group. Disability and so-called special needs are not always visible, and so it is often the children's assistive aids which provide the clue. Pictures of children using wheelchairs, crutches, white sticks and dark glasses are most commonly used to indicate that disabled children are present – but this does not mean that they are participating or achieving in the educational context. In countries where very few aids and appliances are available for disabled children, it is more difficult to capture such images. Besides, the vast majority of children experiencing difficulties in school cannot be visually identified as 'different' from their peers, since their learning difficulties, or the causes of their learning difficulties, cannot necessarily be seen.

Those images that are already in use to promote inclusion (such as posters created by inclusive education programmes), mostly include drawings or photographs of children using wheelchairs. While this may demonstrate that physically disabled children are welcome in the school, it also conveys the message that inclusive education is just about disability, and that disability is just about physical difficulties.

Capturing and conveying still images which portray potential barriers to learning and participation (examples of exclusion rather than inclusion) is also not an easy task. How can an image portray whether girls have equal access to the educational process and are fairly treated? The stigma resulting from HIV/AIDS or TB would have to be explained in a caption to a photograph. Harsh physical punishments given by teachers, inflexible curricula, undemocratic practices in classrooms, rigid teaching methodology and the lack of mother tongue teaching are some examples of potential barriers affecting large numbers of children in many countries in the world, which need to be discussed and documented in words since they are very hard to portray through still images.

Despite these drawbacks to using images in action research, we have chosen to focus on the image-based aspects of this study before looking in detail at the written accounts in the next chapter. We begin by discussing the way that photographs were used to promote discussion and reflection. We focus in particular on their effectiveness in highlighting the organisation of classroom space as a major issue in creating more inclusive environments for learning and participation. The relative merits of using video as part of action research, both in terms of recording activities and as a way of encouraging teachers to become more reflective practitioners, is discussed. Finally we consider briefly the role that mind-maps played in the research process and the difficulties faced in encouraging internal facilitators to promote children's drawings as an action research method.

5.1 Use of photography

In order to capture aspects of the research process over time, a camera was given to the Zambian facilitator. The external facilitators did not provide any specific instructions on how the camera should be used, other than to use it 'to record the action research process'. The camera was used both by the research team and by the school students, and the photographs that were taken give a flavour of school and community life in Mpika. However, the quality and content of the photographs varied. The adults mostly took staged and formal shots, since few people possess cameras and photography is seen as a record of identity, rather than an art form. The children, by contrast, took more action shots, including close-up pictures of children working together in groups. These photos gave the impression that the children were using the camera in a different way, and being more experimental with this new art form.

The use of images as part of this study has been experimental throughout. Our ideas about the purpose and role of images in action research developed

mid-way through the project when their potential became clearer. The action research process grew organically and was not laid out as a set of rigid instructions and actions. The research facilitators were unfamiliar with image-based work and needed time to develop their skills and capacity during the course of the study.

A set of over 200 digital photographs was taken by an external facilitator on the visit to Zambia, in July 2002. Great care was taken not to take close-up photographs in order not to intrude, and to be conscious of child protection issues. A lot of effort was also made to take natural, rather than posed shots. It is important to acknowledge the difference in the approach adopted by a person who has had over two decades of experience in taking photos and in appreciating their impact, in contrast to those who are new to photography.

Inspired by recent literature on photo elicitation[1] and image-based research (e.g. Prosser 1998) a decision was taken to use photographs to elicit responses in focus groups and during workshops. The responses were then analysed and are reported below. A selection of the digital photographs was chosen by the external facilitators in the UK. One group of pictures represented different aspects of inclusive learning: the environment; inclusive classes; and disability. Another group of photographs reflected the process of reflection and analysis involved in action research: workshops; and working outside.

The selected photographs were printed in black and white, in size A4. They were then grouped into contrasting pairs as follows:

Inclusive learning

The environment

> image 1: a neat and tidy concrete school building arranged around a courtyard planted with shrubs and grass

Figure 4

image 2: a rural school with a thatched roof and no walls constructed by villagers

Figure 5

Inclusive classes

image 1: a girls' class organised into groups

Figure 6

image 2: a mixed class where half of the children are seated on the floor in groups

Figure 7

image 1: a class organised in groups with an 'albino' child seated with his peers

Figure 8

image 2: eight children, two sitting alone, in a bare classroom with many empty desks. The children are deaf and being educated in a special unit, but this can not be seen from the photograph

Figure 9

Reflection and analysis in action

Workshops

image 1: a group of male and female participants seated on chairs in rows in a resource centre. The teachers do not appear to be listening intently

Figure 10

image 2: a group of teachers seated round a table, holding pens and having a lively discussion. A flipchart paper is on the table

Figure 11

Working outside

image 1: three teachers standing in a wide open space studying a flip chart

Figure 12

image 2: school children and teachers seated in a circle outside under some trees in a rural area

Figure 13

This set of five pairs of photographs was sent to Tanzania by the external facilitators as a suggested activity for the Dar es Salaam writing workshops. The aim was to encourage the research participants to reflect on their own situations using the photographs from Zambia as a stimulus.

The photographs were given to focus groups of children, parents and teachers, who were asked to respond to the following questions, prepared by the internal facilitators in Tanzania:

- What do you see in each pair of photographs?
- What information on inclusive education can you gather from each pair?
- Brainstorm, and then discuss, the main features of each pair.
- List the agreed features.
- Group the features into main categories. (These may be the same as before or there may be additional ones.)
- Which pictures reflect practices in your school? Discuss.

The photographs provoked a great deal of excitement in the group discussions and comments included:

- 'Our school is not like this.'
- 'This classroom is not inclusive – it is too crowded.'
- 'We do not sit in groups like this.'

The photographs did not lead to any discussions on the particular issues related to disabled children in inclusive education, since the deaf children and those with mild learning difficulties could not be identified. However the images did provoke substantial debate which was recorded and later grouped into the following three themes, which are central to the development of inclusive education in its broadest sense:

- school environments (both outside and inside the classroom)
- teaching methodology and training
- collaboration, including listening to children's voices.

Each focus group was asked to draw a mind-map based on one of the themes. Most groups of teachers and parents chose to focus on the environment, whereas most pupil groups worked on teaching methodology. (*See section 5.5 below for a more in-depth discussion of the use of mind-maps in promoting reflection.*)

The Tanzanian facilitators were present in Zambia when the photographs were taken, and so would have been able to fill in any information gaps for the participants as they studied them. However, they chose not to. It was also

decided not to attach captions to the photographs. This was done to ensure a more open discussion, based on the participants' reactions to the photographs, not on what they were told the photograph might depict.

For example, the participants made some interesting responses to the second image in the 'disability' pair of photographs. The photograph of the deaf children in their special unit had been chosen to stimulate discussion about units and their role in promoting or preventing inclusion. Although there was no caption explaining that the photo was taken in a unit, the research participants' comments show that the picture was still useful in stimulating thoughts on inclusion and exclusion in classroom practice:

Teachers: 'Some children are working in a group, two others are sitting separately on their own with no activity; this class is not inclusive.'

Parents: 'A very small class; children working on their own.'

Pupils: 'It looks like some children have been punished to sit alone; they may be naughty.'

The content of the discussion would have been quite different if it had been explained that these children were deaf, and were being educated separately. It would then have been possible to discuss the reason for the small numbers of children, and questions may have been asked about the lack of hearing aids, the child who was sitting alone, and the pros and cons of special units.[2]

The decision not to use captions to explain the images was in keeping with the open, rather than closed, approach to asking questions in the study as a whole, and to encouraging as broad a discussion as possible about the concept of inclusion, and the impact of exclusion.

However if the workshop facilitators had wanted to encourage a more focused discussion about the specific issues relating to girl children, for example, then a set of captions giving information about the particular contexts shown in some of the photos might have facilitated this discussion. One of the photos showed an all-girls class. Such classes have been introduced in some schools in Zambia in an attempt to overcome the barriers to academic achievement that many girls face, possibly due to them being in mixed classes. The lack of a caption explaining the picture, however, meant that the issue of all-girl classes and gender issues in the classroom was not focused on by the participants who were discussing the image.

Methodologically, it made sense to use the images to stimulate an open discussion about inclusion. The use of photographs to elicit responses enabled a discussion to take place which went *beyond* disability, which is so often the central concern in inclusive education debates. It also gave the facilitators a good idea of the way the research participants were thinking about the issue, and so enabled them to begin analysing their existing ideas and experience. A great deal was achieved in a relatively short amount of time within a one-day workshop which involved a range of other related

activities. In a teacher development context, this exercise could be used to great effect to address the specific issues related to the challenge of implementing inclusion, but more time would have to be allowed to ensure that the issues could be discussed thoroughly.

5.2 Use of physical space in classrooms

Every photograph contains many hidden facts and stories, beyond the immediately obvious. Photographs can therefore be used by research facilitators to generate detailed debates and information sharing. The photographs above (both sets of images entitled 'disability' and 'inclusive classes') illustrate ways in which classroom spaces have been re-organised to enable learning to be more participatory. They demonstrate group teaching and flexible seating. The type and arrangement of seating in the space available, can be a physical barrier to learning and participation, but teaching and learning could be more child-centred, flexible and inclusive of diverse learning needs, if the seating arrangements are adaptable.

Advising teachers through a written training manual to be 'flexible about seating' may not be very helpful if the teachers have only ever experienced teaching (and their own student life) in classrooms arranged in rows. How do you create a picture in your mind of something you have never seen? Yet teachers who have very inflexible attitudes to classroom seating pose a major barrier to inclusive learning.[3] Using images to promote discussion about this issue may be a more constructive way to move practice forward than producing written guidance on 'how to do inclusive education'.

The photographs from Mpika provided education practitioners with a visual example of ways in which classrooms can be arranged differently, even when there are limited material resources (such as desks). The photographs were used in the Tanzanian workshops to show participants how inclusive education is being interpreted in Zambia, in a very similar context to their own. Being able to provide clear visual evidence offered the workshop participants an opportunity to understand better what 'flexible seating' might mean, and gain a starting point for their own ideas and discussions on the matter.

The reactions of some of the Tanzanian participants to these photographs, however, showed that they regarded the fact that the children were seated in groups rather than in rows as strange and different. They needed extra help in understanding why the classrooms were arranged in this way, and that this was a deliberate strategy for inclusive teaching. The photograph was not sufficient stimulus to promote discussion about these fundamental issues related to inclusion. The use of captions would have enabled a discussion to take place about the benefits of child-centred approaches to teaching and learning, since the reasons behind group seating would have been explained.

Figure 14: Using photographs in Tanzania

In this instance the facilitators chose not to supplement the images with their own descriptions of what the photographs were showing (they preferred to allow a free and unbiased discussion). However, an alternative approach would be for the workshop facilitators to offer some simple descriptions of the picture and also bring in additional facts during the course of the discussion. This would enable the participants to move on to fresh angles of discussion, once they had run out of things to say in response to their initial reactions to the pictures, and at the same time could begin the process of sharing ideas from other similar contexts.

For example, the fact that some teachers in Mpika insist that children take it in turns to sit on the floor could be introduced to open up discussions around whether uncomfortable seating is a cause of inequality in the classroom or a reason for dropping out of class. Examples of other seating arrangements which may be more familiar to many teachers could be debated. For instance, should children with visual or hearing impairments be made to sit together at the front of the class, and is this the most advantageous and most inclusive seating arrangement? Impressions gained of inclusive practice from the Mpika photographs could then be compared to alternative seating arrangements and their potential impact on inclusion. The issues raised through the discussion of images links directly to the notion discussed in Chapter 2, that when the presence of disabled children in a school is regarded as a catalyst for change, it is more likely that the education of all children will be improved.

5.3 Using video

The person operating the video camera inevitably influences the type of material that is filmed, and so the discussions and activities that are reflected upon. Choosing what to record, and how to record it, is therefore not just a technical process. Our initial aim in using video (and photography) was to assist in the recording and analysis of the research process. It was not envisaged that these media would also become reflective research tools. In order to capture the events for future reference, a professional photographer and a video cameraman were hired in Tanzania, for the duration of the research team meetings, school visits and inaugural workshop (July 2001). These cameramen were not part of the research team, and despite direction

from the researcher facilitators, they were not effective at capturing the images that the researcher team was interested in.

The video cameraman (and the photographer) persisted in filming the two external facilitators from the UK, and other people in senior positions, despite frequent requests not to do so. This was particularly problematic when group work was taking place. The video footage mostly provides a record of the discussions in those groups which contained the researchers perceived by the cameraman to be the most senior and important.

The inspiration to record the activities on video in Zambia came from a book about oral testimony in the context of community development in Southern countries (Slim and Thompson 1993). This was one of the texts selected at the beginning of the study and shared among the whole research team. (*See Appendix 3 for more details of the other selected texts.*)

The video cameraman who was hired in Zambia was a local secondary school teacher. It was an advantage to have a cameraman who had a background in education and he made a much greater effort to record all groups equally. He became very involved in the subject matter, even providing a discrete simultaneous translation into English when he was recording sessions that were predominantly in Isibemba. He was so inspired by this experience that he tried out some of the ideas raised in the discussions in the secondary school in which he teaches.

This offers an example of action research becoming part of a teacher's practice, rather than it simply being an externally-funded and time-limited activity. It also shows the mutual influence between the cameraman and the research team.

Both sets of video data recorded in Tanzania and Zambia were incomplete in different ways. In Tanzania there was an over-emphasis on recording people who were in senior positions, whereas in Zambia an effort was made to record all group discussions and therefore many incomplete discussions were recorded. Although the video data was unhelpful as an *accurate* record of what took place, it clearly has enormous potential as a tool in promoting the development of reflective practitioners. Despite its imperfections as a tool for capturing the research process, the video material has been used extensively in teachers' meetings to promote reflection. The District Inspector of Schools requested a copy of one of the videos to keep in his office and show to teachers in other districts what is being done in Mpika. The following quote from a teacher, after some local video footage had been shown, indicates the enthusiasm with which the teachers have embraced this new approach:

> 'This is a real workshop, where we were able to watch ourselves and learn from each other, rather than talking about theories that never come into practice. We hope this shall continue.'
>
> (Email from internal facilitator, 26 March 2003)

This experience highlights the seriousness of making video recordings as a legitimate part of any data collection exercise. Its potential can be maximised to ensure that the most appropriate people are appointed to the task of 'looking through the lens' and taking the photographs.

5.4 Mind-maps

The technique of creating mind-maps (*see Appendix 2*) is a way of producing a visual image to illustrate the results of a group brainstorm, and the technique was used in all of the writing workshops in both Tanzania and Zambia. Mind-maps worked well as a form of group visual reflection, and as a way of recording discussions. They also created the basis for the production of written accounts as they helped participants to identify a theme as a focus for their writing. In this way the participants were able to divide up the many themes identified by the group to avoid duplication of writing and to enable a group story of inclusion to be told.

Mind-maps were created at teachers' workshops, research team meetings and at school and community workshops, in inside and outside spaces, in both English and local languages, and there are some examples of these below. An example of one of the first mind-maps to be created in Tanzania can be seen on the 'Action Learning for Inclusion' poster in Appendix 4.

In order to give the Zambian teachers an idea of what was meant by a mind-map, a complex example (which had been created in the research team meeting between internal and external facilitators and the research committee) was shown. This was followed by a brief explanation of how to start creating such a map. The first task was to identify the core issue which was the focus of the discussion or brainstorm, and this was placed at the centre of the map. In the examples below the central theme of the discussion was 'the future' or 'moving practice forward'. The next level of headings – examples of the ways in which practice can be moved forward – were drawn as branches on the map. A tree was given as an example, since its branches and leaves visually represent the spreading out of ideas from a centre, or trunk. One of the dangers of showing the teachers an example of a completed mind-map was that it became a blueprint and so limited the range of types of mind-map that could have been produced, by restricting the participants' own imagination.

*Figure 15: Mind-map created during the Mpika
research team meeting, July 2002*
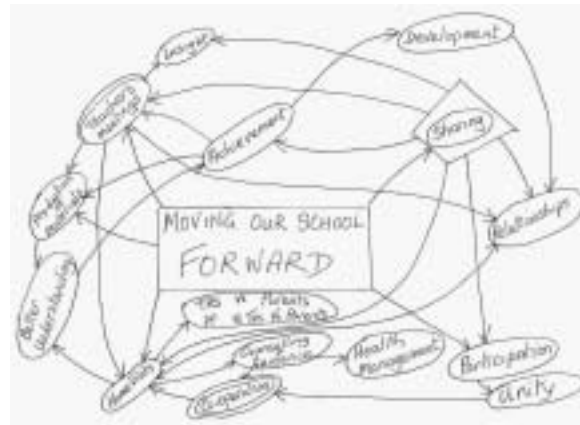
*Figure 16: Mind-map created during a
teachers' workshop, July 2002*
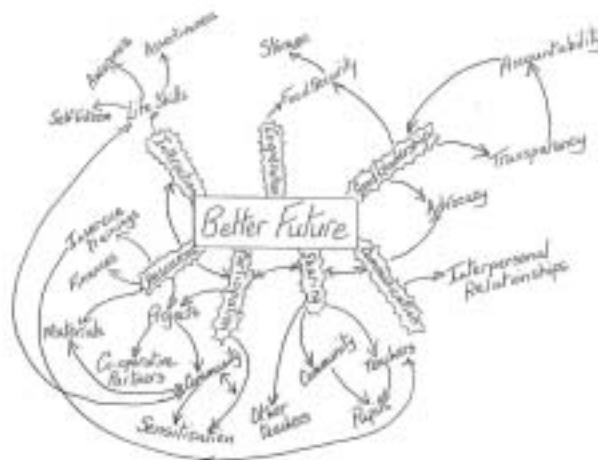
*Figure 17: Another mind-map created during a
teachers' workshop, July 2002*

After studying the mind-map and transcripts from the research team meeting, the external facilitators re-produced the hand-drawn mind-map (*see Figure 15*) on computer. This new diagram (*see Figure 18*) highlighted the key ideas and key words from the discussions, showing that the sharing of experiences, participatory processes and good leadership were seen as contributing to 'moving practice forward'. The diagram attempted to represent the mind-map in a more easy-to-follow way, and in a format that was easier to hare, for the purpose of further reflection. Similar activities were carried out in relation to the teachers' written accounts (*see section 6.6*).

Figure 18: Research team mind-map re-drawn by external facilitators
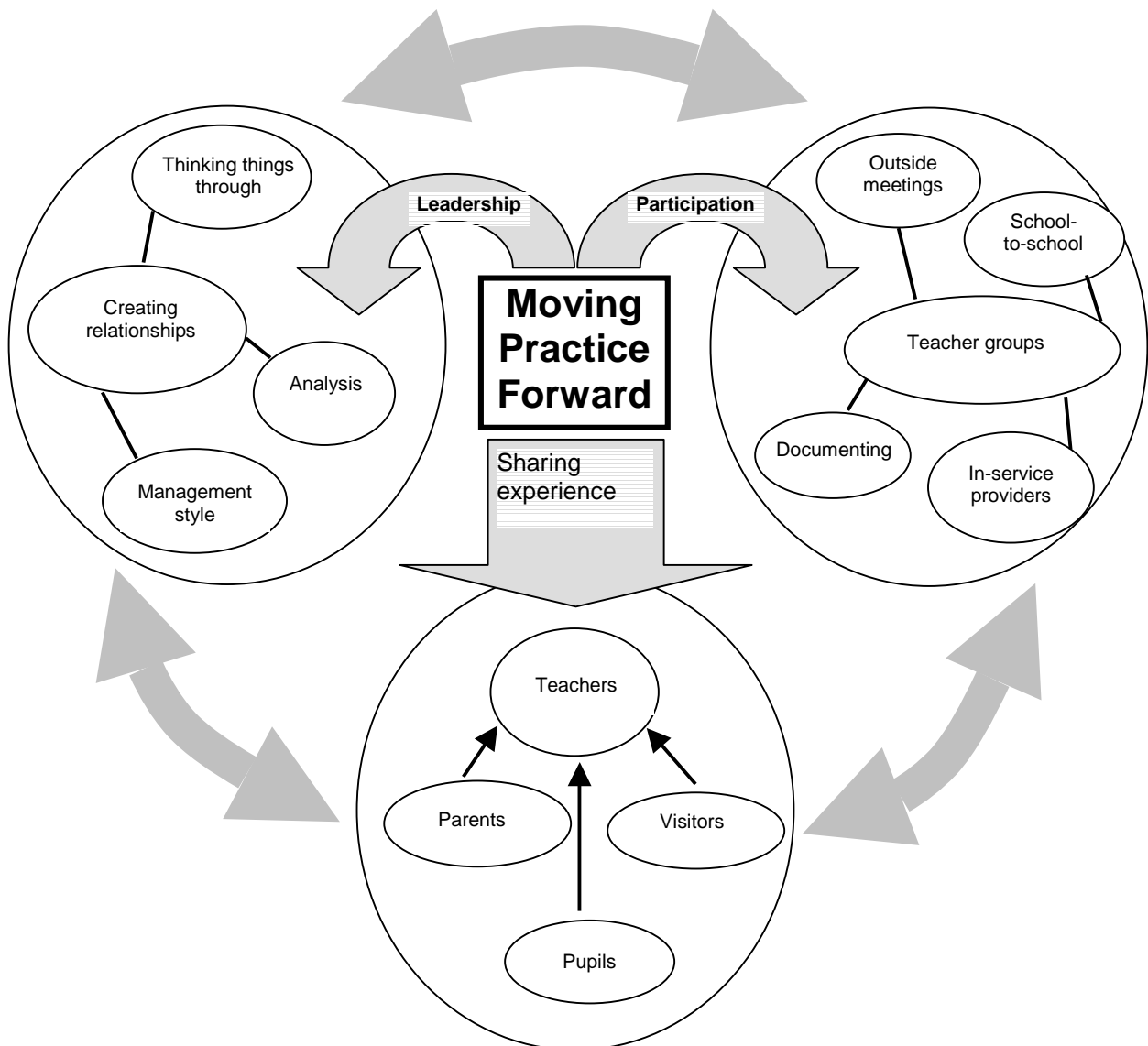
5.5 Children's drawings

Suggestions were made by the external facilitators that children could be encouraged to express themselves through drawing, rather than writing, as a

way of documenting their experience. This would have enabled greater child participation in the study, and would have provided an insight into the usefulness of this medium of communication and expression as part of action research. Asking children to draw pictures of their experience of school life was a technique used successfully by Stubbs (1995) when she adapted PLA methods for use with disabled children while researching the national inclusive education programme in Lesotho. Examples of the drawings and graphs that were created during the research study in Lesotho were shared with participants at the first workshop in Tanzania. But the idea did not 'take off', although in Tanzania some children produced cartoons. Children were involved, however, in composing poems and songs about the barriers they face to inclusion in both countries.

One of the barriers to using drawing in the study was the limited access to paper, pens and other drawing materials, which most children experience in Zambian and Tanzanian schools and homes. Children, therefore, do not grow up with the same level of encouragement to express themselves through art, as might be the case in most Northern countries. The scarcity of drawing materials, together with the internal facilitators' lack of experience in working with drawing as a medium of communication and expression, meant that this approach was not a viable one. Closer monitoring and input from the external facilitators would be necessary in a future project if drawing were to be taken more seriously. However, the overall approach in the study was to provide support from a distance and to avoid imposing outsiders' ideas as far as possible.

5.6 Reflections on an image-based approach

This chapter has focused on two different aspects of the study itself: the development of action research *methodology* (the use of images to promote reflection); and an exploration of the *substantive* issue of promoting inclusive education (by telling the story of the way images were used). In the examples provided in this chapter, images were used to promote reflection on practitioners' and stakeholders' *existing experiences*, as well as to identify what sort of further information needs to be collected, and what action needs to be taken.

One of the main substantive issues to emerge from the discussion of the images in the Tanzanian workshops was that of classroom space and how it is used. The reaction of surprise in response to photographs of children seated in groups, rather than in rows, was indicative of very fixed ideas about the way classrooms can be organised. By contrast, the excess space afforded to the deaf children in the special unit was seen as a form of punishment and as an example of a lack of inclusiveness. Using images to promote discussion about the use of space may be a more constructive way to move practice forward than producing written guidance on 'how to do inclusive education', which tends to be the way that such educational change is promoted. Stakeholders' perceptions of the use of space in educational settings merits further study and could help to provide practical guidance for education

departments and teacher education colleges to offer their teachers – especially in the current situation of serious overcrowding.

From the evidence of this small study, which has experimented with a multi-media approach, we have been able to demonstrate that using images to stimulate reflection is an effective methodology. Images proved to be both an immediate and a thought-provoking way of stimulating people with very different types of knowledge, skills and perspectives to think more deeply about their understanding and experience of inclusive education in their schools and communities – as we set out to explore through our primary research question. The image-based approach appears to provide greater opportunities for the discussion of ideas and experiences than the talk and text based tools and processes used. In fact, it seems likely that the without the stimulus of the photographs, some of the information elicited would not have otherwise been discussed.

Focusing on images, rather than text, proved to be an inclusive approach to working in groups, because images are accessible to people who have learning difficulties as well as to those who have few literacy skills. From our limited experience in this study, it appears that using a range of images in a systematic way as part of the action research process can be a good way of bridging the gap between oral and literacy-based cultures; of overcoming difficulties with literacy; and of communicating using a range of different languages.

In the context of this study the importance of taking photographs and making video recordings was highlighted as being a legitimate part of the data collection exercise. Ensuring that the most appropriate people are appointed to the task of 'looking through the lens' to capture photographic and video images became apparent.

Although the *creation* of images (drawings and photographs) was problematic, making use of photographs taken by others in the research process worked well, using photo-elicitation techniques. Given this success, a consideration of the way that images can be used to promote reflection and analysis will be built into the dissemination phase of the study. A great deal more work still remains to be done, however, to develop useful and reliable image-based tools for future action research projects. More time would have to be invested in any future action research project to allow confidence and skills to develop in the use of images as a basis for reflection, and to encourage children to reflect on their experience through the medium of drawing.

Mind-maps worked well as a form of group visual reflection, and as a relevant visual tool for recording discussions. They also created the basis for the production of written accounts, as they helped participants to identify a theme as a focus for their writing. In this way the participants were able to divide up the many themes identified by the group to avoid duplication of writing and to enable a group story of inclusion to be told.

Inexperience and lack of confidence in promoting the use of children's drawings as a medium of communication and expression, meant that the

research facilitators did not develop drawing as a research tool. Closer monitoring and input from the external facilitators would be necessary in a future project if drawing were to be taken more seriously. Providing support from a distance and avoiding imposing outsiders' ideas were, however, two key aspects of the way that the study was designed, and so close monitoring was not possible on this occasion.

In this study we have mixed our research tools, by using an image-based approach as well as using talk and text. This was in order to elicit a range of responses from research participants. In contrast to the speed and spontaneity of using images to promote reflection, the written accounts explored in the following chapter represent a more fixed medium. Writing is a much more considered process of recording information and so less spontaneous. Information is much more likely to be edited out in the writing process, whereas in responding to images it is possible to capture instinctive responses and feelings about inclusion and exclusion.

Although using images to promote reflection engaged the research participants in a process of *looking at* and *thinking about* their context and existing experience, the production of written accounts engaged participants in the *action* part of the action research cycle. In the following chapter we provide examples from the teachers' written accounts to highlight the way in which they approached the attitudinal, environmental and institutional barriers to the learning and participation of all children. We explore the way in which the writing of the accounts led the teachers to look at and think more deeply about the overall context in which learning is expected to take place – in some cases this included the children's homes – before introducing further changes.

Notes

[1] The term 'photo elicitation' describes the process of inserting a photograph into a research interview, and so far, nearly all elicitation research has been based on photographs (Harper, 2002).

[2] The dilemmas raised by the provision of separate specialist facilities, or units, in mainstream schools are highlighted in a case study in Appendix 7. The role of special units in some of the schools involved in this study provided both a focus for, and a distraction from, the process of reflection and analysis on inclusive practice.

[3] Mmbaga (2002) has documented the way teachers organise their classrooms according to ability in an in-depth ethnographic study in a Tanzanian primary school, where some of the children have visual impairments. The teachers she observed tended to divide the class into slow, fast and disabled learners, so that they could concentrate on those most likely to succeed. The blind and visually impaired children were seated at the front. Immediately behind them were those identified as having difficulties in learning or behaviour problems. Also in this middle section, but seated separately, were those pupils considered to be of average and above average ability. Right at the back were large numbers of children considered to be slow learners. This was the space that the teacher rarely walked to. The pupils who occupied that space tended not to be engaged in classroom activities.

6
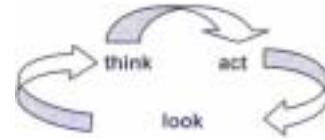
Engaging with written accounts

In this chapter we focus on the processes in which teachers engaged when documenting their experience of trying to make education more inclusive. We also consider the significance of the written accounts as a focus for further reflection within the study. Collaboration between internal and external facilitators also played a significant part in this process and this is expanded on in the next chapter. Some examples are also given from the teachers' accounts of the way in which the writing process led to the introduction of more inclusive practices.

The examples of written accounts that we are using here are mainly taken from Zambia, as the writing process has not yet been fully completed in Tanzania. The action research process used to develop these accounts involved investigating, and reflecting on, the daily activities of teachers and other people in the school community, as described in the previous two chapters. This research was not seen as a one-off exercise to generate data for analysis by outsiders, but as a way of building the capacity of practitioners so that the action research process would become self-sustaining.

In the first half of the chapter we provide illustrative examples of the teachers' writing under the overall heading, 'overcoming barriers' and the accounts are divided into examples of attitudinal, environmental and institutional barriers, as introduced in section 2.7. The second half of the chapter is devoted to the process of discourse analysis used by the external facilitators to analyse the stories in greater detail. We offer an analysis of the ideas, attitudes and actions that the teachers have reflected upon in their writing, but we have also considered what information may be missing. The analysis of the stories became a central focus for the overall data analysis towards the end of the study, by providing an insight into the effectiveness of the action research processes used. Here we moved away from our collaborative action research stance to adopt a more traditional research approach to the analysis of data. This enabled us to look back on the process, and critically reflect on our own actions as external facilitators.

6.1 The written accounts: overcoming barriers

The teachers' accounts provide an insight into how the term 'inclusive education' was interpreted and implemented, and into how the action research process helped them to reflect on their practice. An early set of baseline teachers' accounts, produced as part of the MIEP, provided evidence of the way inclusive education was first introduced in Mpika. This early documentation of lessons taught to classes, which had included a disabled child for the first time, gives some indication of the levels of awareness and

attitudes among teachers prior to our study. This experience of looking in detail at, and writing about, the barriers facing an individual learner with whom the teacher has formed a close relationship, was later applied more widely to children facing a range of social and educational barriers.

A final set of 36 handwritten accounts was produced by 21 teachers from five different schools. It is primarily these accounts that we have focused on in this chapter. There were two main groups of accounts: those that looked at everyday challenges learners were facing in their *homes and communities* – such as poverty, hunger, difficult home environments and HIV/AIDS; and those that looked at *school-based* issues – such as over-enrolment, behaviour problems, 'slow learners' and absenteeism.

School improvement and teaching and learning issues represented the main concerns of the teachers (15 accounts). School attendance issues – such as absenteeism, over-enrolment as a result of free education, late-coming and truancy – were also common concerns (eight accounts). The frequency with which some issues were written about may reflect the relative importance of certain challenges faced by the teachers. Of the 36 accounts, only four were specifically about disability; and three were about HIV/AIDS. Three articles discussed gender issues and girl child marriage, while a further two shorter contributions also tackled gender. Disability, HIV and gender issues were mentioned by other writers within their accounts of broader issues, such as absenteeism.

In this chapter we will discuss the potential relevance of the teachers' written accounts to practitioners in other communities by focusing on our third research question: 'How can the particular experiences of one community speak to a wider audience and at the same time remain authentic?'. The teachers' accounts offer a snap shot of some of the challenges of promoting a more inclusive school environment. They demonstrate the thought processes and activities in which the teachers engaged in order to understand more about inclusion and exclusion in their communities.

Excerpts from the accounts have been selected to shed light on the teachers' views and approaches to the various barriers they face: attitudinal (including gender barriers), environmental, and institutional barriers. These accounts also indicate the following elements of the action research process: honest self-reflection; broad barrier analysis and the further investigation of both new and well-known barriers; integrating action research into daily activities; finding solutions to the problems identified; confidence building in the process of tackling barriers to inclusion. Direct quotes from the accounts appear in quotation marks, while information from the accounts has been paraphrased and is indented.

6.2 Understanding attitudinal barriers

6.2.1 Focus on disability

One of the aims of the study was to encourage open and honest reflection on attitudes and practices, rather than the more common activity of writing reports for inspection by superiors, which inevitably cannot be self-reflective or critical. For example, one of the teachers gave a very detailed, honest and reflexive account of the first lesson she taught to her class when a boy with albinism (commonly referred to as an 'albino') joined her class. This account was written as part of the earlier set of case studies, and so has provided useful baseline data on teacher attitudes.

> When the albino boy first joined the class the teacher decided to run a special lesson. The aim of the lesson was that the other pupils should be able to 'socialise with an albino freely, communicate with him, and accept him as a member of our class'. Yet the teacher describes her own emotional response to this situation and her difficulty in accepting the boy:
>
> > 'I was not so free with him. I feared his hands. He had sores on them… My belief was that whenever you see a child with albinism you have to spit saliva on your chest, so I imagined that touching him would affect me.'
>
> The teacher goes on to explain that the pupils' responses to the presence of the boy caused considerable disruption in class, so she abandoned the lesson and took them all outside for a physical education session, in order to encourage the children to mix more freely.

The account highlights a range of issues which are often raised by those teachers who do not want to have disabled children in their classroom: that they will disrupt the learning of others; that their condition is contagious; that they need special attention; and so on. Yet the teacher rose to the challenge. She faced up to her own superstitions, and by doing so set an example to her pupils. She also responded flexibly to the disruption to the class by changing her lesson plan. The documenting of this particular lesson was clearly an important part of the teacher's own education about disability, and served as an awakening and a response to these potential attitudinal barriers.

It is not possible to promote inclusive education if teachers are hiding their own fears and negative attitudes, or behaving in a discriminatory way. Although this account may appear to contain negative elements, it was extremely useful in bringing such prejudice out into the open. This enabled the author, other teachers and members of the research team to reflect further on the issue of attitudinal barriers and how to overcome them.

When the international research team visited the school in July 2002 – about a year after this lesson was documented – it was evident that this child had been fully accepted in the school, and was not treated differently. The initial

difficulties associated with fear and superstition had been overcome, and efforts were being made to attend to his low vision through appropriate seating in the classroom, and making teaching and learning materials visually accessible. The difficulties were overcome through a combination of technical input from MIEP and the reflection and sharing process which meant the teacher was not isolated in her fear and low confidence, but had opportunities to express, discuss and change her attitudes within a context of peer support and review.

6.2.2 Focus on gender

The Zambian teachers were already very conscious of gender barriers, both in school and in society, which prevent girls from being included in education. The barrier analysis approach therefore did not serve to bring a totally new problem to the table, but helped to confirm that this was definitely a barrier that needed serious attention and that efforts needed to be strengthened in order to meet national policy expectations.

The Zambian education policy states that girls must be allowed back into school following the birth of their babies. One teacher of an all-girls class had already noticed, however, that very few girls in this position do return to school, or stay in school for long after they return, although he did not know the exact reasons for this. The teacher used his involvement in this study to look at what was causing the drop-outs and to think about how the theory of inclusive education could be made to work in practice.

> The teacher interviewed some girl child mothers, parents and other girl pupils, and held a class discussion with his all-girl class in order to find out why young mothers of school age are not retained, despite the national policy of including them. He presents in his account a list of the reasons, including:
>
> - lack of child care support from relatives
> - parents insist the girls get married rather than go back to school
> - boyfriends/husbands get them pregnant again
> - the girls are dependent on their boyfriends/husbands, who often will not pay school costs
> - the girls become shy and lose self-confidence.
>
> His account provides key quotes from girls and parents which helped him to assess the situation, for example:
>
> > 'Our classmates laugh at us. They also pass very bad comments saying that we are mothers and school is not our right place but home [is]. Due to such comments at times we feel out of place and therefore feel like stopping school.' (girl child mother)

'It is a wastage of resources to send them to school for many of the girls do not complete due to the pressures they encounter in caring for the babies. Relationships between the girl and the responsible man or boy doesn't end and therefore she is expected to become pregnant again… She has little say over her body.' (parent)

Through his inquiry he was able to draw up a list of solutions which he thought would help the girl child mothers to be included:

- 'Girls who are retained in school need psycho-social counselling and also spiritual counselling to build their self-esteem and self-confidence.

- Classes which have girl child mothers need to be counselled so as to help their friends rather than discourage them.

- Parents need to be talked to on the importance of sending their children back to school and its advantages.

- Classmates who try to infringe the rights of the girl child mother should be dealt with (i.e. punished and counselled).

- Girl child mothers need to be disciplined equally with the fellow pupils.

- Teachers must be sensitive to their needs (e.g. emotional) and avoid language that can injure the child's emotions. They must also be encouraged to participate actively in school co-curriculum activities.'

Since there were two girls in his class who were pregnant, the teacher was able to ensure that his practices addressed these points. His account goes on to say:

'Due to continuous counsel the girls have been very free to share their experiences The academic performance for both girls is good and I hope they will not change. Joyce came to school till the last two days before delivering. She was never a regular absentee despite being in this situation. This has been my first time to encounter such an event... Parents have been talked to and they are very co-operative… Classmates have also come to the realisation of their friends' situations... The girl child mothers also participate freely in class activities and co-curriculum activities.'

This teacher concluded with details of the challenges that were still faced, such as the financial difficulties for girl child mothers and the fact that more girls were still getting pregnant, but he stated: 'I have learned much from this study'. Indeed, six months after the account was produced the teacher wrote to EENET updating his account and providing details of how the girls had stayed in class and gone on to pass their exams.

This account deals with an issue that is a global phenomenon. Teenage pregnancy and early marriage is something that every school, parent and pupil will be aware of at some level, and it is also something that is tied up in social and cultural norms and traditions. As such it is a sensitive issue for school communities to address. The teacher we have described was able to use the process of inquiry to find out more about the issue as it impacted on his class, and begin discussing it with his pupils and their parents. Unfortunately his account does not provide details of *how* he raised the discussion with parents in a way that avoided resistance. The account does, however, offer a basis for further reflection with his colleagues, which could provide an opportunity for him to think in more depth about this.

Several other teachers wrote about early marriage and pregnancy being a barrier to the presence, participation and achievement of girls. They also identified the barriers the married girls or young mothers faced even when they continued to attend school. These included bullying from peers, sexual harassment from male teachers, and timetables which clashed with childcare and domestic duties.

With support from the external facilitators, the teachers were enabled to take their initial analysis one step further by formulating a list of questions which could be used by other practitioners. This helped them to identify areas of further action research, which included taking practical steps to find solutions to these barriers. The list of questions in Box 5 is based on the barriers identified and could be used to guide other practitioners in their own research activities and in finding solutions in their own context.

Box 5: Questions developed from teachers' accounts of early marriage and education

- Can changes be made to the timetable?
- Can catch-up or evening classes be run, or extra homework arranged, if the girls are absent or too busy for school during the day?
- Can the girls be paired or 'twinned' with other pupils, so they support each other's learning?
- Can a counselling service be offered and can lessons on life skills, reproductive health and rights be introduced or improved for all pupils?
- Can toilet facilities be improved and privacy considered?
- Can the attitudes of teachers and pupils be changed so that they stop bullying and abusing married or pregnant pupils and instead offer support?
- Can the parents or husband be advised on the benefits, for them and the girl, if she stays at school?
- Can the family make small changes to the household chores or baby-care arrangements?
- Can the family be supported to find a way of financing education for a married/pregnant girl?
- Can the girl and her husband be offered advice to avoid (further) pregnancy until she completes school?

6.3 Understanding environmental barriers

6.3.1 Focus on sanitation

This account emphasises the importance of examining barriers to inclusion in the wider environment, not just within the school or classroom. It also highlights the inter-connected nature of the barriers faced by this disabled learner, who is often absent from school because his mobility appliance is broken and his family cannot afford the repair cost, and who is unable to access the school toilets. The disabling impact of his physical impairment increases with each barrier he faces. The example illustrates the complex nature of disability, but it also shows how a simple intervention, such as asking teachers to reflect on their practice, can lead to major changes – *without* requiring an increase in resources.

The teacher set out to understand why this learner was frequently absent from school. Through interviewing family members at home, the teacher discovered that the boy's family faced considerable financial and logistical difficulties in getting his callipers repaired frequently. Difficulties with transport to school, accessing orthopaedic workshops, additional costs associated with the purchase and maintenance of orthopaedic appliances, the lack of accessible sanitation at home and at school, and parental attitudes, are all highlighted in this short account. The account has been paraphrased, but includes direct quotes.

> A 15-year-old boy, disabled as a result of polio, was identified in the community. He had stopped attending a special school, situated a long distance from Mpika, because his parents could no longer afford the school fees and transport costs. He used callipers and crutches to move around.
>
> As part of his case study research, a teacher (the author of the account) regularly visited the boy at home. On one occasion he found him crawling because his father had taken the callipers to be repaired. The boy was not able to attend school when they were being fixed because he could not get to school without them. The teacher describes how he collected the boy on his own bicycle on a couple of occasions when important visitors were coming to the school. The boy explained to the teacher why he often missed school:
>
> > 'Sir, my parents are poor, and therefore even welding the callipers is not easy. Sometimes it takes days for them to be repaired due to lack of money, and this means that all these days I should not report to school.'
>
> In a further discussion with the boy's mother during a home visit, the problem of inaccessible sanitation was raised:
>
> > 'This boy has problems when going to the toilet and moving about in the surrounding where people urinate anyhow… he cannot get into the toilet with crutche*s.'*

The mother explained that at home he used her plastic shoes to keep his hands clean when he went to the toilet. Since the boy tended to move around using his hands at home, it emerged that his father considered him to be unclean and refused to eat with him. When the teacher asked what he did at school when using the toilet, the boy said:

> 'I have never used toilets that are there at school because there is nothing that I can wear on my hands.'

This is an example of an account in which a teacher reflects on his own practice of identifying and responding to the barriers to inclusion that are faced by an individual child. By including some research and documentation activities into his teaching practices, the teacher was able to reveal and record information about his pupil (his problems accessing the school toilet, his father's unhelpful negative attitude) which could then be used in reflection and planning with the parents, the boy and teaching colleagues to develop solutions. This writing process set in motion a further cycle of action research which led to the development of solutions to the barriers highlighted. The school PTA has since become involved in constructing two new toilets, one of which will be accessible for people with physical impairments.

6.3.2 Focus on classroom seating

The action research process involved building supportive relationships and confidence to tackle inclusion as well as identifying inclusion barriers and finding solutions within the school environment. The following account looks at the way individualised seating was provided for a child with a physical impairment by adapting existing classroom furniture – at no extra cost. It also reflects on the role of non-specialist teachers in inclusive education and illustrates the development of a teacher's confidence in her own ability to respond to the disabled child in her class. The teacher documented the process of finding out about and responding to the barriers facing the child.

> At the start of the account, the teacher reflected on her role as a non-specialist teacher, and the fact that her own initial attitudes could have been a barrier. She described her lack of confidence in responding to a learner with different needs:
>
> > 'Upon receiving Patience[1] in my class I had the following fear: I had a strong feeling that Patience's problem cannot be handled by me for a simple reason that I am not trained in special education hence the problem seemed to be a bit complicated for me.'
>
> Having overcome her fear, she investigated and addressed the barriers facing the child. She found that the child had trouble with handwriting, and realised that this was probably caused by the environmental barrier of unsuitable school furniture. She was than able to take small steps in overcoming this:

'Having identified Patience's problems, my main target was how to improve her handwriting. Firstly I improvised two infant chairs specifically for her to be using… [for] drawing or writing… due to her disability normal desks are too high for her.'

In reflecting on what she had gained from this process of investigating and trialling ideas, she said she has realised that teachers can learn to problem solve, rather than rely on 'special' training or equipment. She asserted:

'In most cases teachers lack confidence in themselves on how to try and implement other people's ideas that they share. But as teachers we must be dynamic in order to solve some problem that hinders our progress in our classroom.'

This account deals with one of the most common attitudes expressed by teachers faced with the prospect of teaching disabled children; they believe they are not qualified, and that the education of disabled children is not their responsibility, but the responsibility of a specialist. It is probable that without the support she received from the internal facilitator, a fellow teacher, she would not have had the confidence to assume responsibility for this child, let alone investigate and experiment with ways of overcoming the barriers that were present in her classroom.

6.4 Understanding institutional barriers

Overall the teachers' accounts represented a balance between focusing on individuals, social problems, teaching methodology, and organisational and system change. However, in describing the actions they took in response to their research, it is clear that most of them were successful in bringing about changes in the lives of individual children, and in using more participatory methods in their teaching, but that fewer of them took actions to address wider issues. These wider issues were described as being considerably more challenging in terms of bringing about change.

'Free' education was one of these wider issues; several teachers had investigated it and mentioned it in their accounts, but few discussed any related actions they had been able to take. The accounts detailed below deal with over-enrolment in schools (as a result of the relatively new national policy of free education). They look at the solution of engaging parents and other teachers in discussions about how to respond to this problem, which has the potential to undermine inclusive practices by placing additional strain on teachers' time and resources:

The teacher wrote:

'Zambia has declared free education in the middle basic section (Grades 1-7). The parents have taken it to be a blessing, they are bringing their children in large numbers because they are relieved. Now the problem is on the teacher who has to handle the pupils.

I introduced a discussion about the problems caused by a rapid population increase… This work was done in a social studies lesson... [In a brainstorm the children concluded that] In relation to the classroom situation, an over-enrolled class has the following problems: seating problems, noise, unmarked work, incomplete lessons.'

The teacher goes on to describe how, after working with his pupils to research how the problem of free education and over-enrolment was manifesting itself in the school, he called a PTA meeting in order to find some solutions to these problems. The parents who attended 'felt sympathy for their children who were sitting on the floor due to over-enrolment'. However, some had mixed feelings about the decision to construct a new classroom block to ease the 'congestion' in the classrooms, since it was the parents who would be expected to make financial contributions to this building project. In the wider context of the poverty within the community, this proposed solution, therefore, was not an easy action for the teacher or the school to implement.

Several other accounts described the efforts of teachers to involve parents in the life of the school, and most of them focused on the need to encourage parents to make financial contributions. Yet there are also many references to parents being uncooperative and unsupportive of their children's education, and of the 'bad background of most pupils'. In the following account a head teacher talks about the way he has acted to involve parents in the participatory leadership style of the school:

'Our school has adopted a participatory leadership style. This promotes the participation of teachers, pupils, parents and other stakeholders in the running of the school. One of the features of this style is being democratic. We realise that every member of the school community's contribution is important. Pupils in their classes and through their pupil representatives voice their contributions to the school affairs.'

He then reports on a discussion that was held between teachers and PTA members about the general performance of pupils in the end of second term examinations (the learners were not included in this particular discussion). Reasons discussed for the pupils' poor performance included: over-enrolment, absenteeism, poverty, and household chores. There was also an acknowledgement that both teachers and parents had not given the children enough support. An agreed set of responsibilities was drawn up by, and for, the parents, teachers and the school, in order to improve the children's performance.

These short excerpts from the teachers' accounts have provided some examples of the way in which the different sorts of barriers identified (by the teachers in their action research activities) have been reflected upon, analysed, and in some cases addressed. They provide some indication of the way the teachers have 'looked' at the challenges they face, and of some of

the thoughts and actions which have been stimulated by the act of looking – a key part of the cyclical action research process.

6.5 Analysing teacher discourse

Analysing teachers' writing is one way of understanding the way they teach, interact with others, and define themselves and their actions. A large part of our day-to-day activities are performed through language. Through assessing the language the teachers used in their written accounts we can gain an insight into their attitudes towards the children they teach. Of course it is possible that teachers may say and write things that they do not actually practice, and that they may have prepared their accounts in order to please an outside audience, rather than to inform their own practice and contribute to a collaborative teacher development process. One of the aims of the analysis was to address the possible misrepresentation of the practices described.

An in-depth analysis of the teachers' accounts was conducted in order to explore the effectiveness of the process of reflecting, analysing and documenting. This analysis was done in the UK by the overall research co-ordinator using qualitative research methods, with a primary focus on teacher discourse. This was a critical stage in the action research process since it involved an evaluation of the usefulness of the guidance provided throughout the process by both external and internal facilitators.

Examining the accounts in detail using 'discourse analysis' methods made it possible to gain a more thorough insight into the attitudes, values and behaviour of the writers. Even the shortest sentences and paragraphs were scrutinised in this way and time was invested in taking pieces of text apart, and in dividing the language used into themes or categories. Terminology around the issue of disability and discrimination is a sensitive matter, especially when working cross-culturally and through translation. The outsiders' role in the context of this study involved alerting the insiders to pay closer attention to details of language and interpretation, and to provide technical help in how to do this.

Initially five categories of discourse were identified: action research; inclusion; development; EENET; and local. The first four categories were loosely described as 'outsider discourse', and were potentially representative of outside influences on insider language and conceptualisation, and therefore on the process of reflection and analysis taking place as part of the study. Examples of data were identified from the accounts which demonstrated the teachers' participation in the themes identified.

In the early part of the analysis process, words such as 'democratisation', 'rights' and 'co-operative learning' were coded, or categorised, as outsider discourse, but in order to make sense of the *local understanding* of these words, categories such as 'pedagogy', 'morality', 'tradition', 'religion' and 'discipline' were introduced. Many of the teachers wrote about democracy being a bad influence on learners' morals and behaviour, implying that traditional ways of doing things were better, since children were perceived as

being more disciplined (less noisy and less likely to question authority) in the past. It is inferred in some accounts that 'rights', and by association 'democracy', are associated with lawlessness, noise, chaos, and the erosion of traditional values. Many accounts express concern about change, and indeed change can be very disturbing, but it is not possible to introduce inclusive practices without fundamentally changing the way that educational systems are organised, and therefore the relationship between teacher and learner.

Many of the teachers' accounts inferred that the teachers believed in 'democracy' and 'rights', yet they seemed to contradict themselves as they expressed hostility to these values. Those who have attempted to adapt the way they teach to accommodate democratic values seemed to be under pressure from other teachers, and from community members, to conform to local norms of teacher-learner relationships, dress code, respect for elders, and so on.

The following excerpt indicates that 'modern' ideas about rights were not considered appropriate by all teachers in Mpika. In this study we defined inclusion as being inextricably linked to issues of social justice, equity and human rights. Yet here is a teacher reminiscing in one of the accounts about the old days when corporal punishment was not questioned, and so contradicting the central philosophical stance of the study:

> '…a wrong doer was given corporal punishment there and then… We were not killed when our teachers spared not the rod. Instead we were very disciplined.'

> She goes on to say that human rights 'have been misunderstood' and as a result 'we find many [children] misbehaving thinking they will not be touched… a rod has been spared and a child has been spoiled'.

Emotive language is used in the following excerpt from an account about 'absenteeism', written by a deputy head teacher. The author identifies absenteeism as a sign of indiscipline, moral decay and infection. The influence of health education messages are evident in the language used: 'heal', 'contagious disease', and 'must be eradicated'. References to the fact that certain diseases can be 'eradicated' implies that the teacher's approach is one of removing the undesirable behaviour, rather than trying to understand why some children behave in this way:

> 'Who are supposed to heal the contagious disease of absenteeism?… The trend of absenteeism is bad if stuck in the mind of a child. He may even use it when he grows up to destroy progress of other people's work. Absenteeism must be eradicated completely to achieve better results.'

In the same account children who are frequently absent are likened to law-breakers who need to be caught and taught the error of their ways. This teacher sees the situation as a stand-off between 'us and them'. The teachers are in a judicial role, charged with enforcing a set of laws, to which the

learners must conform, or face the consequences. Yet in the action research study we tried to encourage teachers to listen to children and be aware of voices that are not being heard. If we look at the quote below, we can see that if this particular school wants to move forward on the issue of absenteeism, then all the stakeholders need to look at this teacher's words, and begin to reflect on and address the barriers to inclusion and school development which these words quite clearly represent:

> 'A crafty language of malingering children must be learnt and studied by both parents and teachers to pin down such culprits and put them on the right track.'

It would seem from these excerpts that the teachers are caught in a balancing act between outsider and insider, and modern and traditional, in their role as educators in their communities.

The following quote expresses the dilemma facing action researchers attempting to promote change in educational practices, and the particularly difficult position in which the inside facilitators found themselves in this study:

> 'The overlap of developers' and local discourses does not lead to improved communication, but to strain on those locals who are involved in both, and to techniques of evasion, silence and dissimulation.[2]'
>
> (Hobart cited in Robinson-Pant 2001, p.318)

If such communication difficulties are to be avoided, and more analytical accounts are to be produced, a greater amount of time should be devoted to the process of reflection. This would help to air research participants' views, and reconcile some of the contradictions in the use of language, rather than rushing into the documentation stage of the research process.

One of the tasks of the discourse analysis was to identify missing information. Examples of what the teachers *have not* explicitly talked about were seen as being just as significant to the action research cycle of reflection and action, as what they *have* talked about. Have the teachers concealed information? Do they infer certain issues, without explicitly discussing them? Have they disguised their real feelings or motives? In this section we focus on two themes – poverty and achievement – which were not discussed explicitly by the teachers, but which emerged during the analysis.

6.5.1 Poverty

It was initially assumed that poverty, and the associated limited material resources, would emerge as a major theme in the teachers' written accounts. During the brainstorming and subsequent mind-mapping exercises conducted in the workshops in Tanzania and Zambia, poverty-related and resource shortage issues had been identified by participants. Broad issues such as in-service training, life skills, advocacy, accountability, transparency, poverty and food security were raised. However, following the workshops most of the

teachers from Zambia focused on their personal concerns as teachers, and not on these bigger issues.

There are several possible reasons for this decision and the resulting 'missing' information from their collective accounts. Perhaps they did not perceive themselves as working in impoverished conditions, after all, poverty is a relative concept. Perhaps they felt that reflecting on and analysing their own practice was likely to lead to more action and change than dwelling on 'uncontrollable' resource issues. Perhaps reflecting on the smaller, 'closer-to-home' issues was easier, given the time, knowledge and experience of the teachers. Finally, perhaps the teachers' decision to focus their attentions away from financial and resource issues was influenced by the external and internal facilitators' views on the resource shortages as a barrier to inclusion. We will look more closely at this issue of the facilitators' and EENET's influence on teachers' reflections and writings in the next section. For now though we will look at what can still be gained from the written accounts by assessing what is missing or inferred.

Although the word 'poverty' only appears as an issue highlighted in brainstorming activities about barriers – and there is very little discussion in the teachers' accounts about its actual impact on learners and educational provision – it is possible to elicit what the teachers were saying, or learning, about poverty, by identifying references to the 'taken-for-granted' aspects of poverty in Zambia, such as 'poor sanitation'.

For example, from their references to the fact that – despite 'free' education – parents are expected to make financial contributions towards the repair of furniture, provision of better toilets and the purchase of books and uniforms, their writings indicate that the Zambian education budget is still inadequate in meeting the educational requirements of its child population.

Other implicit evidence of underlying poverty that could be identified in the writings included:

- details about a child who was burned at the age of one by other children 'while the mother was away', and as a result became injured and disabled. It is likely that the child's mother was away from the home earning money or finding or growing food, and so, lacking an alternative, had left her young child in a situation of great risk, in the care of fellow children
- descriptions of children who wear 'double clothes' (more than one layer). The parents reportedly considered this to be an untidy way of dressing, while the children said they needed the layers to keep warm or 'in order to appear fat'. The latter reason is clearly related to their wish not to be suspected of having AIDS (an issue mentioned often in the accounts) or of being so poor that they have insufficient food to eat.

We can see from these examples that readers of such accounts (outsiders or fellow teachers) need to focus not just on what is explicitly stated, but also on what is inferred or implicit ('reading between the lines'), or even on what has

not been mentioned at all. An entry in an external facilitator's research diary, written in Tanzania at the beginning of the EENET action research project, identified the importance of 'missing information' as an issue early on:

> 'I began to feel that it was the things that were not said that we needed to listen to more than the things that were said.'

<div align="right">(18 July 2001)</div>

6.5.2 Achievement

Most of the teachers' accounts fitted neatly into the two categories of presence and participation. These are two issues closely related to the inclusion of marginalised groups – groups of learners that are so often absent, or not participating, in educational activities. Yet, as we saw earlier, an analysis of inclusion should not only consider whether children are in school and taking part in the activities, but whether they are also achieving anything as a result of their presence and participation.

First we need to define what we mean by achievement in this context. Achievement is not only about an individual reaching his or her academic potential. Education is also a social process, which can impact on a whole community's well-being. For children who were previously excluded from school, it is important that they are accepted, happy, able to make and sustain friendships, able to communicate and move around independently. In other words, it can be argued that the affective[3] aspects of education are just as important as the effectiveness of education. The benefits of these affective aspects of education can lead to children (especially those with impairments) becoming more independent and more able to make a contribution in their families and communities. It follows that independent children will require less care from their families and therefore enable their care-givers to devote their time to income-generating activities. This is one of the unseen impacts of inclusive education on the alleviation of poverty in households.

Where the teachers' accounts do refer to children's achievement, they primarily refer to the affective, rather than the effective aspects of education. The accounts do not record achievement related to improved academic standards, but they indicate shifts in attitudes and a raising of expectations among teachers, pupils and parents. It should be stressed here that the study did not aim to bring about direct improvements in academic standards, but it did aim to bring about affective changes within schools which would have an impact on the development of inclusive practices. In the following example, great achievements have been made in the affective aspects of the child's education, and this is directly related to one of the teacher's interventions.

> A teacher was concerned that a girl with learning difficulties appeared to be neglected. She had no uniform, her parents had not paid her school fees, her attendance was poor, and she did not have any friends. The teacher embarked on a short piece of research to find out why. He held discussions with the child, her classmates and made several home visits. The direct result of this intervention was that the parents talked about their anxieties over their

daughter, and even about discussing the problems she faced in school. As a result of the teacher's intervention, the parents bought her a uniform and started paying school fees. This led to an improvement in her attendance and in her appearance, and an increase in her confidence so that she began to make more friends.

One of the striking features of the teachers' accounts, is that many of them write about their increasing appreciation of the parents' perspective. This is a direct result of the processes of investigation and reflection. The first set of baseline case studies had contained more judgemental statements about parents' 'negative' attitudes towards the school, and about the 'bad' home backgrounds of some of their pupils. The following extract from a teacher's account illustrates how such attitudes had changed by the time the teachers' accounts were being written:

> 'Traditionally, education of children has always been left in the hands of teachers. This study has revealed to me that a teacher cannot educate a child alone, without the involvement of parents.'

> (EENET 2003c, p.24)

6.6 Reflections on the writing process

Writing is a way of knowing, and a method of discovery and analysis, but it only tells part of the story. Writing is not an end in itself – it is a means of thinking, reflecting and evaluating, and assists in the longer-term process of improving practice and getting to grips with the meaning of inclusion and exclusion. In this study it was used both as a way of recording reflections and activities, and as a basis for further reflection.

In the early stages of the study the teachers found that focusing on individuals (identified as vulnerable, at risk and/or excluded from education) helped them to develop confidence in their understanding of the term inclusive education, and in developing appropriate responses, both in and out of the classroom. This is reflected in the writings. For teachers who had no specialist training, researching and writing a case study about an individual, and familiarising themselves with the social and learning barriers facing that individual, helped raise their awareness about inclusive practice.

Many of the teachers' written accounts indicate that, through focusing on individual learners, they have developed a personal involvement with the learners and their families. Engaging with inclusion took them out of the classroom and into the community to find out why particular learners are not fully included. With the introduction of a barrier analysis approach, there was a gradual change of emphasis in the teachers' writing and reflection, from a set of case studies which focused on the 'problems' and/or impairments of individual children, to a later set of accounts which analysed the underlying social and environmental issues or barriers behind educational exclusion and marginalisation. By asking open questions about the situation of an individual, and by reflecting on and documenting the actions which followed, expertise

has been developed among teachers who are facing a broad range of barriers to the inclusion of all children in education.

Initially writing was regarded as one of many processes to help teachers reflect, analyse and document their experience. However the research team had not envisaged how useful the written products of this process would prove to be. Moreover, the opportunity to reflect on the writing produced by teachers provided further opportunities for analysis, in Zambia, Tanzania and the UK, and, in turn, contributed valuable insights to the ongoing cyclical process of action research. This cycle of writing and reflection became an informal part of the teachers' development.

The exercise in supporting teachers to document their practice through a process of reflection highlighted some potential difficulties, and even the possible inappropriateness of encouraging written communication in a context where there are many barriers to the sharing of that information. There was a clear role for the external facilitators to play as outsiders in providing minimal support in typing, word-processing, collating and reproducing the teachers' accounts, so that a further process of reflection could take place. In providing this support at a distance, it is important to emphasise the fact that the external facilitators have also learned a great deal.

It was suggested by one of the internal facilitators that the teachers' accounts which have already been produced could be adapted for use in teacher education colleges, (where there is a serious shortage of training material on the issue of inclusive education), and for in-service teacher development. Trainee teachers, who are expected to implement inclusive education on completion of their course, could be encouraged to produce similar accounts as part of their training, in reflecting on their experience of teaching practice.

There is further work to be done in the development of tools and processes. For example, as part of the final set of guidelines resulting from this project, we intend to develop an approach to discourse analysis which is straightforward and easy to use. This will help teachers involved in teacher development and teacher training to become more attuned to analysing written information as part of their involvement in action research and in their daily work. As an integral part of this approach to document analysis, practitioners will be encouraged to think about what might be missing from such written accounts.
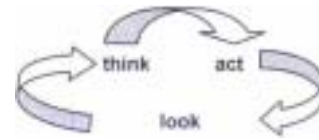
Notes

[1] Children's names have been changed to protect their identities.

[2] 'Dissimulate – conceal or disguise (one's thoughts, feelings or character)' (The New Oxford Dictionary of English 2001).

[3] 'Affective – relating to moods, feelings and attitudes'. 'Effective – successful in producing a desired or intended result' (ibid.).

7

Working collaboratively

> 'Local people involved in local projects end up supplying information to
> initiators of such projects from the North, rather than learning from it as well.'
> (Evaluation report, Mpika, December 2001)

In this study the participation of external facilitators was intended to
strengthen the activities of reflection, analysis and writing – by providing
guidance on methods of inquiry and technical support in recording and
reporting conclusions – while at the same time helping to overcome some of
the limitations associated with action research. As the above quotation
reinforces, this study set out to empower practitioners and contribute to an
improvement in inclusive practices, rather than to extract information from
people and projects.

The study acknowledged and explored issues that can be extremely
enriching, yet have within them real tensions and challenges – such as the
relevance of learning across cultures; collaboration and power issues
between South and North; exploring how participatory processes can be fully
inclusive; and bridging oral and literacy-based cultures. The study reinforced
the importance of 'learning from the South', while at the same time
acknowledged the valuable role that external facilitators can play as critical
friends.

The fourth research question guiding the study was: 'How can outsiders and
insiders best work together to improve practice?'. The study was carried out
by small teams of internal facilitators working in partnership with insider
education practitioners and stakeholders in Tanzania and Zambia, and who
were primarily considered to be insiders themselves. Their activities were
supported, mainly at a distance, by the UK-based external facilitators.

The study involved an exploration of the relationships between the two groups
that we initially called 'insiders' and 'outsiders' in one of our research
questions. However, as the study progressed this distinction became less
clear and the relationships became more uncertain, particularly for those who
took on the task of internal facilitator. Their role sometimes shifted to that of
an outsider, even though they were working on the inside, alongside other
members of the local community and speaking the same language. There
was less ambiguity about the role of the external facilitators from the UK,
however, whose role was more clearly defined as one of supporting internal
facilitators and research participants to reflect on, and learn from, their
existing experiences. Integral to an exploration of the way internal and
external facilitators worked together are the potential challenges and pitfalls of

communication – especially when this takes place across continents, cultures and languages, and often with unreliable communication media.

Various aspects of communication have already been raised in this report. In Chapter 2 we discussed the conceptual confusion surrounding the term inclusive education and the different ways in which the term has been interpreted and communicated in different contexts. In the last two chapters the use of images and the production of written accounts were explored as a way of communicating ideas and analysing existing experiences. Here we begin by highlighting the importance of good working relationships and a shared vision as a basis for collaborative action research. We go on to outline the 'hands-off' style of management which characterised the study and the very considerable communication challenges faced in making collaboration work. Nevertheless there were still many external influences on the research process and the production of written accounts and these are analysed here.

The importance of using language carefully in defining key terms, such as inclusive education, is discussed through an example of the process used in Tanzania to reach agreement on Kiswahili translations of key terms. The particular challenges presented by research participants who have learning difficulties, sensory impairments and limited literacy skills are also considered in this chapter, since one of the aims of the study was to explore ways of communicating with people who have a range of abilities. We go on to consider the relevance of action research methods in the context of oral culture and tradition. Finally we report on the way that selected texts were used as a basis for sharing ideas and developing an approach to collaborative action research among the international team – given that communication was limited to the use of email and only two face-to-face meetings of the whole team.

7.1 Developing relationships

> 'Practitioners have been used to a model of research that is not participatory… Building trusting and mutually respectful relationships is essential and this process has to be engaged upon consciously and consistently over time.'
>
> (Dyer et al 2003, p.113-14)

It would not have been possible to enter into this kind of collaborative action research without first having developed a relationship with the internal facilitators in Tanzania and Zambia. Embarking on a reflective process – which will inevitably expose the way teaching and learning is conducted in schools and the way marginalised people in the community are treated – requires a considerable level of trust between members of the research team, if it is to be a constructive process. It was difficult to identify partners who were able and willing to enter into this research relationship, who had direct involvement in promoting inclusive education, and who had a similar understanding of the complex issues under consideration.

It is not only a question of developing relationships with research partners built on trust, but it is also essential that there is a willingness to commit time

and resources to the action research process and to the development of the necessary skills. In reporting on an in-depth action research study conducted in India, Dyer et al (2003, p.113) came to the conclusion that:

> 'The initial action research phase – problem identification – is complex for practitioners who have not been encouraged to think reflexively about their own practices before. Committing time and resources to this phase is very important as this step is a pre-condition to any further research work.'

The two lead research facilitators in Tanzania and Zambia, who were identified to take the study forward, were known to EENET prior to the study. They already had some of the necessary skills, but they were also prepared to become learners in the action research process. They shared a similar philosophy with regard to the longer-term goals of inclusive education, and were already actively involved in inclusive education programmes in their countries. In addition, the team members from Tanzania and the UK shared a common experience of having professional backgrounds in special education, and of having been involved as outsiders in promoting inclusive education through international agencies, such as UNESCO and Save the Children UK.

Similarly, it had taken many years to develop the levels of trust, co-operation and working relationships that seemed to exist in the Mpika area in Zambia, and the particular success achieved in some of the schools deserves recognition. This was a strong foundation on which to build knowledge and confidence of using collaborative inquiry methods in investigating that practice.

Initially the action research study was welcomed by education officers in the MoEC in Tanzania. In a meeting held in July 2001, the then Commissioner of Education expressed his interest in the study as a way of informing the Ministry's response to the inclusion of all children in education, given the increased enrolment expected in January 2002, and their obligation to educate children identified as having special educational needs.

However, conceptual difficulties and perceived differences between the internal facilitators and a key official in the MoEC resulted in the study being delayed for some months in Tanzania. It seems likely that one of the reasons for this was that the research project had come to be seen as a continuation of the UNESCO-sponsored inclusive education programme, since it was focusing on the same group of schools – yet the focus of the study was very different.

These differences in the conceptualisation and the interpretation of inclusive education made it difficult initially to introduce the broader concept of barrier analysis. Throughout the study, however, there was an openness to the idea of barrier analysis among practitioners involved at district level – both in the administration and among the teaching staff and school committee members.

7.1.1 Management of the study

This study was deliberately managed with a 'hands-off' approach, which prioritised local empowerment and community action. With only two face-to-face meetings of the whole international research team, the external facilitators, played a very low-key role in supporting and helping the internal facilitators to reflect on the activities they were arranging in their communities and on the benefits and results of these activities. The internal facilitators were in charge of the action research activities taking place in their communities.

This approach to the management of the project was dictated to some extent by the communication capacities of the internal facilitators. Occasional telephone contact was possible with the facilitators in Tanzania, although there were some critical periods during the study when difficulties in reaching the facilitators by telephone led to frustration and delays. The Zambian facilitator did not have a telephone and relied on his colleague's computer and telephone line for email contact. Towards the end of the project he had access to his own computer and telephone which improved the email communication at the critical stage of analysis. Telephone communication with Zambia was still not possible, however, as each pre-arranged call from the external facilitators was thwarted by line problems, heavy rain and thunderstorms. This email from the facilitator shows how problematic email and telephone communication proved to:

> 'I had a terrible experience on my computer the whole of last week. It was raining heavily and suddenly lightning struck through the phone line… and all of a sudden the modem was blown!'
> (Email communication with Zambian facilitator, 25 January 2003)

Throughout the project, therefore, email communication was invaluable in ensuring that interaction between the internal and external facilitators could happen. It enabled the process of reflection and analysis of the in-community activities to take place, in a way that would have been very time-consuming with 'slow mail'. The ongoing conversational email communication also served to build the personal capacity of the Zambian facilitator. During the two-year project there was a great improvement in both the complexity and accuracy of the language used and in the detail and analytical content of the information provided. It is doubtful if these changes would have happened to the same extent under a rigid communication regime of formal reports, following structures imposed by the external facilitators.

A more formal, rigid monitoring contact would not have been compatible with the over-arching aim of the study, which was to explore methods of debate, reflection and action that are empowering to a community. The medium of communication – hands-off, supportive management and community involvement in developing information sharing processes – was also our message. The way information is presented and communicated can sometimes be as important as the content of what is presented, and in our EENET work we refer to this as 'the medium is the message'.

7.2 External influences on the written accounts

As discussed in the previous chapter, there was evidence in the teachers' writing of the impact of writing formats and conceptual frameworks, as suggested by the external facilitators. For some of the teachers this guidance was helpful, but for others it seemed to have provided an unnecessary diversion from their natural thinking processes, and may have been interpreted as 'rules' for the action research. In this way it is possible that the scope of the teachers' accounts was limited by a set of unwritten guidelines, or rules, which were communicated unintentionally.

The influence that the external facilitators unintentionally had on the style and content of the accounts gradually became clearer during the discourse analysis, and in preparing the accounts for the publication, 'Researching our Experience' (EENET 2003c). There was evidence that the external facilitators had contributed to a narrowing of the information shared in the teachers' accounts, and that this was likely to compromise the trustworthiness of the accounts.

The motivation for, and purpose of, writing was discussed in detail during the workshops. It was stressed that this kind of writing was very different from formal report writing, and the teachers were urged to 'write freely', and not to 'think in terms of structured reports and case stories'. Writing was presented as 'a process of helping you to *learn* more about your work' (EENET 2002a). Yet unintentionally, and perhaps inevitably, frameworks to guide the writing crept into the process and so the teachers did not write so 'freely'.

One of the guiding questions, for example, that the teachers used in their research and writing was: 'Whose voices are heard/not heard?'. This links to one of the key principles of the research – *'listening to different voices'*. However, it is likely that this was misinterpreted. We had hoped to hear stories of the efforts made by a community to actively seek out the 'voices' of the most vulnerable and marginalised children who were excluded from education, such as those disabled children selling goods in the market, who had perhaps never been to school. In other words we had hoped to hear how they went about doing their research with marginalised groups, how they found them, how they interacted with them. Instead, in response to the question about whose voices are heard, the teachers simply recorded details of the people with whom they held discussions. In some instances the teachers had interpreted 'whose voices' to mean 'what ideas' they had heard.

Many of the teachers' accounts contained a formula of headings: purpose, processes, evidence of impact, lessons learned, challenges. This formula was traced back to a draft account co-written by the UK research co-ordinator and the Zambian internal facilitator during the latter's visit to the UK in March 2002. The headings originated from a discussion on how to help the internal facilitator think more analytically about writing. The ideas had been recorded on a flip chart and the draft account based around the suggested headings had been typed up. The intention had been to demonstrate a possible framework that could be taken back to Zambia and 'negotiated' with the

research participants and local research committee members. Instead the framework became a template, which was used by the majority of teachers in structuring and presenting their research and writing.

This example illustrates two key points relating to the role of external researchers, and the potential threats that their involvement can have on the validity of action research. First, the power of the external facilitator to influence other researchers should not be underestimated. Therefore the introduction and presentation of 'possible' frameworks and methodologies must be handled carefully to avoid the 'possible' becoming the 'only definite' way of doing something. Even inadvertently 'imposed' ideas can narrow the scope and results of the action research, and undermine the development of locally understandable and sustainable ways of investigating, reflecting on and implementing improved educational practices.

Secondly, this example stresses how communication media can have different status and impact in different contexts. For instance, what may be seen as a draft document in the North, may be interpreted as a final and official document in contexts where computers and printed documents are scarce.

Another instance of possible external influence on the written accounts relates to the issue of poverty. It is common for financial barriers to emerge as the first item on a brainstorm list – they are often the most obvious barriers, seem to be the most insurmountable, and at times even offer an excuse for inactivity. Yet debates that focus purely on issues that people cannot directly influence (like global poverty) can be demoralising.

The external facilitators wanted to ensure that the action research process enabled participants to focus more on what they had already achieved and on what could still be changed, than on what they could not do. During the study, therefore, there was ongoing encouragement to engage in debates that acknowledged the seemingly insurmountable barriers, such as financial difficulties, but which did not lead to participants' ideas, reflection and enthusiasm about inclusion being dampened.

The intention was to stimulate debate on a diverse range of barriers to inclusion, and avoid discussions which would de-motivate the research participants. At no point were participants told not to research and write about poverty issues. However, the fact that all poverty issues were then seemingly avoided in the teachers' accounts – except for implicit or passing references – indicates that the influence of the external facilitators may again have resulted in a narrowing of the information being shared through the teachers' accounts.

7.3 Motivation for writing

The motivation for writing, in many contexts, may legitimately be 'to get my story published', rather than 'to share my story and help other teachers and myself learn from the experience'. The research participants in both countries were highly motivated by the prospect of their work being published through

EENET. Giving participants a practical reason to produce a written record of a piece of research proved to be a useful lever in this study for encouraging teachers to write. It gave more purpose to the writing, since there was a guarantee that the accounts would be published and read. Efforts in the UK to encourage teachers to document their work have proved extremely difficult, despite the strong focus on literacy and better access to higher education. The possibility of publishing in some form could be a motivating factor in conducting further research of this kind in future.

There was a danger in this study that writing would come to be seen as an individual activity on which the individual's writing style was judged. For some participants, the central concern could have been to produce a well-written individual account, (as if it were part of a writing competition), rather than to produce collaborative analytical accounts, which provided important information about, and insights into, the current understandings of inclusive education. The production of 'Researching our Experience' has to some extent helped to overcome this, as it has enabled all the teachers to have easy access to accounts written by colleagues in different schools, and it has inspired new participants to become involved in the action research project.

In order to overcome a problem of reduced motivation among the teachers midway through the project, the internal facilitator requested that the teachers involved in the study be given certificates by the University of Manchester as a motivating factor for their participation. In accordance with this request, a certificate was designed by EENET, with the logos of the University of Manchester and EENET, in preparation for the formal end of the project when the final set of accounts had been written. The combination of this formal recognition and the association with a university in the UK, helped to maintain the teachers' interest and enthusiasm at a difficult time, when it was not obvious what they were going to gain from participating in the study. The research process had, after all, taken place over a long period of time. The teachers began their involvement in September 2001, but it was not until June 2003 that they received a published copy of their stories.

One of the main principles behind this piece of action research is that pioneering practice in inclusive education needs to be documented and shared. The traditional way of doing this is for an outsider, with good communication skills, to visit a project site and write a report, preferably including as many direct quotes from stakeholders as possible. In this study, however, teachers were encouraged to research and write their own accounts.

The following two short paragraphs give a small indication of the subtle, but important, differences that are likely to occur between these two different methods of documenting innovations in inclusive education. The type of language used, and the sentence length and writing style are clearly very different in the two accounts. The first is an extract from an account written by one of the external facilitators as an example of how an account could be structured, based on listening to teachers discussing and telling their stories

of working together to overcome barriers to inclusion. It was written as if the Zambian teachers had written it, but in longer, more complicated sentences:

> 'It seems to us that the most important strategy for moving practice forward arises from the sharing of experiences. In our schools we have tried to encourage such sharing, particularly amongst the teachers. This has been achieved by the creation of teams of teachers that meet on a weekly basis to think through common problems and plan new teaching approaches.'
>
> (EENET 2002a, p.41)

The second was written by a group of teachers, focusing on the same issue of sharing experiences:

> 'At our school, teacher group meetings play an essential role. In these groups, teachers discuss matters affecting their work. Topics or areas of discussion are not dictated to the groups. Groups brainstorm and thereafter classify and prioritise their topics.'
>
> (Teachers, Musakanya School, in EENET 2003c, p.29)

These quotations not only provide an example of different writing styles, but they also highlight the way insiders and outsiders can work together on a writing task in order to produce an authentic account. The quotations emphasise the contrast between an outsider's interpretation of a situation and an insider's reflection on their own experience. Sometimes it can be helpful for insiders to have both perspectives, as an outsider may be able to highlight factors that insiders simply overlook because they are so familiar with their own situation and context. However, if the reflection, analysis and documentation process is intended to improve inclusive practice, it is essential that the writing process remains the responsibility of the insiders, and that any changes made in the editing process are made clear.

7.4 Terminology and conceptual confusion

The language of inclusion is complex and has been widely debated and documented within the English language. From the beginning of the study we were aware that communicating key terms and concepts relating to inclusion would be a major challenge, both for the insiders and outsiders, research participants and facilitators. Confusion over language has the potential to de-motivate and dis-empower, and so reduce the potential for participation and collaboration.

Terms that are understood, or considered acceptable, in one context (such as 'slow learner' or 'special children') may be meaningless or 'politically incorrect' in another. The discourse analysis in the previous chapter, for example, highlighted the fact that terminology is not just a matter of semantics – terminology can (consciously or unconsciously) convey deep-seated attitudes and beliefs. Complex challenges in the study therefore included: how to ensure that everyone used language with which they felt comfortable; how to ensure that outsiders' language was not imposed, or misunderstood; yet, at

the same time, how to ensure that any language or terminology which is based on negative attitudes is highlighted for debate, and is questioned through the processes of awareness and understanding that the study aimed to foster.

We cannot claim that in the relatively short time of this study that we managed to address all these issues, or that the action research process succeeded in fully raising and addressing terminology that was potentially built on negative beliefs. However, we can show that the process enabled participants to begin thinking about the language and terminology that they used, and so provided a basis for ongoing reflection.

7.4.1 Defining key terms in Kiswahili

The Tanzanian facilitators were concerned about how effective their writing workshops would be in actually helping parents, pupils and teachers to discuss and reflect on their experiences of inclusion and exclusion in education. Their concern stemmed from their visit to the research site in Zambia. They felt that the Zambian school communities clearly had a much better grasp of the concept of inclusive education, and were therefore starting their action research cycle from a position of joint understanding.

The Tanzanian facilitators were essentially *outsiders* to the Tanzanian research site, as they were working as consultants, and not for the Ministry of Education. They decided that more preparatory work was needed with the research participants – *the insiders* – if the action research activities (primarily writing workshops) were to be useful to their school communities. The action research activities needed to help them think deeply about their practices and together work out how they could improve or change things and how to document their experiences. Ongoing miscommunication between participants about the basic underlying concepts of inclusion in education would have undermined this process early on, and would have been a disincentive for the school communities to continue working together on reflection and improvement after the workshops.

Some seminars on inclusive education were therefore held prior to the writing workshops. One of the aims of the seminars was to give participants time to work together in groups to produce their own understanding of the concept of, and barriers to, inclusion. There was a strong focus on the language and expressions used to describe key terms, and on giving participants a chance to reach joint decisions on these terms and develop a sense of 'ownership' of the terms.

The seminars were held in Kiswahili, (as there were no external, non-Kiswahili-speaking participants) which enabled pupils, parents and children to participate effectively in a language they were all comfortable with. A considerable amount of time was spent reaching agreement on the Kiswahili term for inclusive education. Initially four different Kiswahili terms were being used by the participants. Although the differences between them seem minor,

for the participants they made a significant difference to the meaning, and possibly the interpretation of the term.

Box 6: Defining key terms in Kiswahili – an example from Tanzania

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Elimu means education. The debate centred around the adjective 'inclusive'.

Term agreed upon: *elimu ujumuisho*

Other terms used: *elimu jumuisho* - prefix 'u' omitted
                      elimu mjumuisho – prefix 'u' substituted by 'm'
                      elimu ya ujumuisho – additional word 'ya' added

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The internal facilitators involved the participants in providing the Kiswahili equivalents for other key terms where they found it difficult to find an appropriate word or phrase. For example, the facilitators began by using the term u*tafiti ushirikisho* for 'participatory research', but participants felt it should be called u*tafiti shirikisho*.

The discussions that were held in preparation for the writing workshops can be seen as an important part of the action research cycle, even though they were not initially planned by the Tanzanian facilitators or suggested in the initial guidance from the external facilitators. The aim of the seminars was not to 'teach' the participants what inclusive education was, nor to force them all to start using one accepted language for inclusion. The preparatory work was devised to help the participants reach a common understanding of the key concepts and terminology that they would need when reflecting on, analysing and documenting their practices.

It is important to add a note of caution here, however. There was some concern about the inclusive education workshops taking place before the action research workshops because of the potential for influencing and invalidating the ideas and documentation that the workshop participants might produce. There was a risk that during the writing workshops and throughout the research process they would say, do, or write what they had been 'taught', rather than what they actually understood. However, the internal facilitators, who are highly experienced in the field of inclusive education, were aware of the 'dangers' and they ran the seminars in a way that minimised this risk.

In such a situation, there is clearly a need to strike a balance between: leaving the participants to struggle, and potentially fail, in their individual efforts to understand concepts and share ideas; and offering too much direct input so that the action research merely becomes an exercise in trying to describe and implement the ideas of external facilitators. At the time of writing this report it had not been possible to carry out an analysis of the outputs of the Tanzanian writing workshops, as the accounts were written in Kiswahili and the translations have not yet been completed. However, a future analysis of the accounts may help us to understand if, and how, the preparatory seminars helped or influenced the teachers in their thinking – allowing, of course, for

potential misinterpretations through translation and the fact that there is not a set of earlier accounts to act as a baseline.

7.5 Accessibility of language

Accessible communication is at the heart of EENET's work. The main aim is to make information on inclusive education available to a wide range of readers, and this involves much more than simply distributing free resources. Accessible communication includes improving the visual accessibility of written documents and presenting information in alternative formats.[1] Just as important as the format of communication, however, is the style of communicating and the language that is used. Language can be intimidating, confusing or boring. Or, it can be reassuring, explanatory and exciting – depending on the words used and the way they are presented.

Of course it is not always easy to strike the right balance with the language used, especially when communicating across cultures and dealing with complex and emerging issues like inclusive education. For this particular approach to action research to be effective, it was necessary to facilitate whole school communities in the process of discussing, analysing and documenting their practices. Flexible approaches to language had to be encouraged so that no group would be excluded simply because of their language difficulties or skills.

We referred earlier to one of EENET's principles, 'the medium is the message', which implies that the *way* information is presented can communicate as much as the content of *what* is presented. For example, producing an accessible document on inclusion – using engaging language, free of jargon, presented in large clear print, with a simple design and easy-to-navigate structure – has the potential to convey as much about the principles of accessibility and inclusive practice as a list of rules on how to do it. Similarly, running a workshop in which people who use a range of different languages and forms of communication can fully participate conveys as much about the practice of inclusion as an instruction manual.

The example in the box below illustrates some of the language challenges which were highlighted by the study. It also shows how the action research activities (*the medium*) can be used so that they help people to think about inclusion and act in more inclusive ways (*the message*).

The first workshop in Tanzania in July 2001 was attended by representatives of various disabled people's organisations. They were all male, and represented the following impairment groups: blind, deaf, deafblind, and albino (which includes people with visual impairments, associated with albinism). They attended the workshop with their interpreters and guides. The workshop was mostly conducted in English, with translation into Kiswahili provided by the representative from the MoEC.

The internal and external facilitators facilitated the workshop in a way that would suggest a model of an inclusive classroom – using participatory methodology and considering the range of languages used (both spoken and sign languages).

The two interpreters (for the deaf and the deafblind participants) were using two different forms of communication. The sign language interpreter was using Tanzanian sign language, and the interpreter for the deafblind participant used a form of tactile communication – he drew capital letters in Kiswahili on the participant's hand with his forefinger. Needless to say, this was a very slow process, open to misinterpretation and confusion, but this participant was clearly very experienced in attending international meetings and made every effort to participate in discussions.

Many new concepts were introduced during the workshop, such as the idea that inclusive education is broader than just the inclusion of disabled children; that everyone is capable of researching their own situations; and that listening to a wide range of 'voices' (especially children's voices) is important. These sorts of ideas need very careful translation and interpretation. They may be hard for some participants to understand – and even harder when conveyed through translation – and they may be easily misinterpreted. It is likely that some information was missed, especially in the process of sign language interpretation.

The experience described in Box 7 highlights the need for clarity and simplicity in the original style of language; the more complex the original message, the more likely it is to be misunderstood, especially when conveyed to another language or culture. The following excerpt from one of the external facilitator's diaries illustrates this:

> 'The issue of language and communication was a pervading issue during this workshop. Whilst participants were familiar with English, the nature of the agenda demanded further clarification of key concepts in the local language… The presence of individuals with sensory impairments also challenged our thinking on communication. My feeling was that their needs led us to be more careful in clarifying our contributions and that this was to the advantage of everybody involved.

The example of this workshop, in which the many different languages and forms of communication were accommodated, demonstrates that it is possible to present ideas about action research in relatively straightforward language.

7.6 The credibility of an oral approach

'If the voice of poor communities is to be heard more often, it will have to be predominantly through oral encounters and exchanges.

Slim and Thompson 1993, p.20

Slim and Thompson (1993) emphasise the importance of adapting to oral communication and accepting its value, rather than imposing the values of the dominant literacy-based culture. In their opinion the importance of oral testimony sometimes lies in its divergence from facts, since oral sources have a different credibility. In oral culture listening, asking and telling skills are highly developed, and are therefore considered to be as reliable and as valid as writing.

The appropriateness of collecting data, or information, in the form of written accounts from the participants, written reports from the internal facilitator, audio and video material, email correspondence, and minutes of meetings in the context of an oral culture was an issue of concern throughout this study.

There is a potentially fundamental contradiction in this action research process: on the one hand, facilitating the discussion of inclusive education in a range of ways (not always in a written form) that enable everyone in the school community to participate; then, on the other hand, encouraging the documentation of the process of these oral activities to satisfy the external facilitators' need for written proof that they happened. Balancing the need for action (by insiders) with the need for documented research (often by outsiders) is perhaps one of the main difficulties of conducting such a study.

In carrying out this study, we have been engaging with the particular challenges of working with words and images in the context of an oral culture. Although during the course of the study we have mostly been working with teachers, who are literate, it is important to remember that the cultural context in which they have grown up, and in which they work, is predominantly oral.

The Zambian facilitator mentioned on a few occasions that even the teachers found writing very difficult. In addition, he reports the role of the school-based monitoring teams – set up as part of the study – as being one of 'co-ordinating, supporting, communicating and sharing ideas in the school', indicating their preference for oral encounters and exchanges. The words 'writing', 'recording', and 'documenting' are notably absent when he refers to these teams and their activities.

In keeping with oral culture, role plays, surveys, field trips, discussions, brainstorming, and home visits to parents and children were used as research methods by the teachers, in their process of learning more about barriers and solutions to inclusion. However, very few of these 'oral' activities have been

documented by these research participants or the internal facilitators. The teachers' written accounts describe the issues they found out about in relation to inclusive education. This information will undoubtedly help them discuss school improvement with their colleagues and others in the community. Understandably, however, the teachers' accounts do not describe in detail the 'methodology' they used to find out this wealth of information. Documenting communication/research *processes* in this way is often taken for granted in cultures that are no longer predominantly oral, but it would be wrong to assume that such recording is valued or understood in the context of oral culture.

This is an ongoing dilemma, and one that EENET cannot claim to hold the solution to. It is not unique to Africa or to education issues. In the context of this study, it is hard to see what the solution would be. The only way we could have guaranteed that detailed notes on all of the discussion and reflection activities were written would have been to have an external facilitator present to do the recording. Alternatively we could have insisted that all research participants and the internal facilitators engaged in writing down absolutely everything they did. However, the skills involved in recording accurately and analytically are considerable and beyond the scope of this project. These solutions would have conflicted with the study's stated aim of finding ways to reverse the trend in which education experiences are documented almost exclusively by external facilitators, and would have meant imposing the values of a literacy-based culture.

From the evidence and documentation of the action research activities that are available, we know that the use of both video and audio taping of discussions, classroom practice, etc, was a popular and successful way of engaging teachers and other community members in observing and reflecting on various aspects of inclusion and exclusion. Such recording methods are more 'in tune' with oral culture and teachers found it easier to relate to experiences that they were watching, rather than experiences they were reading about. They also offer a permanent record of the process of research and reflection activities and of the facts and findings that emerge as a result of those activities. The use of video-based research and documenting offers a potential bridge between written and oral cultures, in the sharing of knowledge on inclusive practices.

7.7 Communicating ideas and values through literature

Communicating between cultures is not easy and can be open to misunderstandings. It is particularly difficult when discussing complex issues, such as inclusion, using different languages. It is even more challenging to communicate effectively about processes which practitioners could use to facilitate communication on inclusion in education!

In order to support our exploration of action research processes in school communities, members of the international research team were encouraged to read relevant literature to develop, and agree upon, common understandings about key issues and approaches. A number of books were

purchased and reports copied for sharing with all members of the team. This was an effort to ensure that all of the facilitators were 'speaking the same language' and had similar reference points for the study.

In selecting appropriate literature, an attempt was made to provide a cross-section of themes representing different perspectives, in easy-to-read formats. An effort was also made to ensure that the literature was South-focused, and that it helped to create a common language and set of principles between the research team members. The documents that were shared can be divided into the following categories: oral culture; the use of images; children's participation; using PRA/PLA methodology in inclusive education research; and developing inclusive policies, practices and cultures in inclusive education using methods of collaborative inquiry. A brief summary of each text can be found in Appendix 3.

One of the most useful documents, referred to throughout the study by the research team, was the original research proposal (EENET 2000). This was a useful reference point for all team members, but especially for the facilitators in Zambia and Tanzania, as it embodied the main aims and philosophy underpinning the study.

Throughout the study, additional short articles and examples of action research tools and processes were placed on the 'Action Learning' section of EENET's website to further stimulate the thinking of both the research team and the wider group of EENET's critical friends who had taken an interest in the study. (Hard copies of new documents were sent to Zambia, since Internet access was not available to the facilitators there.)

Regular news updates about the study were included in EENET's newsletter, 'Enabling Education', which also aroused considerable interest among a wider audience (*see newsletter article in Appendix 6*). This helped to include a wider range of stakeholders from various countries in discussions about the longer-term process and philosophy which underpinned the study. In the early stages of the study, a decision was made to use the term 'action learning' (*see poster in Appendix 4*), rather than action research, in order to make it more appealing and accessible to a wider audience, but in the later stages, participants expressed a preference for the word research. Through a combination of the literature that was shared, the website which encouraged wider debate, and the news updates in 'Enabling Education', the study became a focus of attention for a wide range of education practitioners, and therefore had much greater scope than a conventional time-limited research project.

7.8 Reflecting on collaboration

The importance of developing relationships as a basis for the initiation of an action research process was highlighted in this study. Investigating and exploring educational practice using a reflective process potentially exposes the way teaching and learning is conducted in schools and the way marginalised people in the community are treated. For insiders to enter into

an agreement with outsiders to pursue a research agenda which risks exposing failings in individuals, the system and government policy, a considerable level of trust is required. Identifying research partners who were able and willing to enter into this kind of research relationship, and who also had direct involvement in promoting inclusive education, was extremely difficult.

Traditionally action research has tended to involve individual teachers in researching their own classroom for their own self-improvement, often in isolation from other teachers in the same school. This study set out to promote a collaborative approach to action research – not only *within* a school, but *between* schools in the same community and between school communities in two countries facing similar challenges, while also making connections with school effectiveness and improvement issues and recent moves towards inclusion in the UK.

Communication between the research facilitators and participants in Tanzania and Zambia was most productive during face-to-face meetings. There was very little communication between the two countries otherwise, despite the fact that an email distribution list was set up. However ideas were shared on a more regular basis between the clusters of schools in each country. The research participants in Zambia suggested, however, that they would have appreciated the opportunity of corresponding with teachers in schools which have made progress in promoting inclusive practices in other countries. In the proposed dissemination strategy there will be a strong emphasis on building links between practitioners working in different countries, but in similar contexts in terms of resources.

Each group of research facilitators recognised that they had much to learn from being involved in the action research process and from using this form of collaborative inquiry. In fact, the UK-based external facilitators were also 'part of the data' and were 'under scrutiny' throughout the process. Co-ordinating the research process, analysing the data and compiling the final report, while at the same time being the object of scrutiny, has not been easy.

The terminology used to describe disabled children, children identified as having special needs, or even children who are considered to learn more slowly than their peers, differs across cultures. Negative terminology is considered to convey deep-seated attitudes and beliefs. We faced a complex challenge in the study to ensure that everyone used language with which they felt comfortable, while at the same time ensuring that the language used by the research facilitators was not imposed, or misunderstood. Nevertheless, we demonstrated that it is possible to present ideas about action research in relatively straightforward language. This was consistent with EENET's commitment to ensure that language and information is accessible, but it was also to meet the communication needs of people with sensory impairments in the example from Tanzania. Finally the use of carefully selected literature in inspiring key members of the research team proved to be a useful way of developing a common language in the study, and of encouraging research

facilitators to experiment with different methods and processes of collecting and reflecting on information.

Notes

[1] There is not the space within this report to detail the many ways in which information can be made more accessible. There are various existing resources that can do this including: Save the Children UK's guidelines "Access for All: Making participatory processes accessible to everyone" available on EENET's website www.eenet.org.uk/key_issues/communication/communication.shtml in several languages and in English large print, and from EENET in Braille/audio versions; and the Royal National Institute for the Blind (RNIB) guidelines on visual accessibility – see their website www.rnib.org.uk. Readers can contact EENET for more information on this issue.

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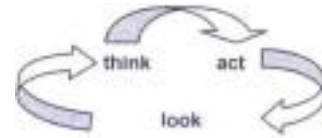
Drawing out the lessons

This small piece of collaborative action research was exploratory in nature. The aim was not to develop a set of indicators for inclusive practice in sub-Saharan Africa, but to explore ways in which education practitioners could be supported to reflect, analyse and document their experience. In this study we defined inclusion, or inclusive education, as being **the process of increasing the presence, participation and achievement of *all* students in their local schools**, with particular reference to those groups of learners who are at risk of exclusion, marginalisation or under-achievement.

The study involved an exploration of the ways in which external facilitators can provide the necessary support for practitioners to build on their existing experience, rather than imposing a Northern approach to special education. Nevertheless there was a tension in the study between the need to pay attention to disability as a cause of educational exclusion, while at the same time being committed to the broader vision of inclusion.

The research team had a broad vision of inclusive education, and saw it as a way of achieving EFA, rather than as a parallel programme. However it is acknowledged that some disabled learners do face significant barriers to learning and participation which require adaptations to the school environment. Inclusive education is often seen as a challenge to the vested interests of specialist agencies, which often have a single impairment focus.

As indicated in Chapter 4, there were three main aspects of the study: processes, outcomes and implementation. We will conclude the report by analysing our findings and outlining the policy recommendations under these three headings. In summarising the findings we will refer to the essential link between changes in educational practice and the importance of developing a shared understanding of the values and beliefs that underpin inclusive education among practitioners.

8.1 International policy framework

It is widely acknowledged that poverty is both a cause and a consequence of disability and that poverty and disability are mutually reinforcing which leads to increased vulnerability and exclusion (DFID 2000). It would be naïve to suggest that this study has contributed directly to the reduction of poverty and the inclusion of marginalised groups in education. It has, however, shed light on one of the major causes of exclusion in the education system in countries of the South. The importance of promoting the social inclusion of disabled people through international collaboration has recently been highlighted by the Director of the World Bank, James Wolfensohn (2002):

'Disability needs to be brought into the development mainstream through a dynamic alliance of the UN system, governments, agencies such as the World Bank, non-governmental organisations, the private sector and other groups worldwide.'

The study was consistent with the principles outlined by DFID of promoting inclusive development while at the same time ensuring a twin-track approach to disability. Recent evidence, however, from a wide range of international agencies working on disability and development issues shows that disability issues are not being addressed in the PRSP process. Although lobbying has resulted in more awareness, and there has been some consideration of these issues in Uganda, in general disabled people are not perceived as being economically active and their organisations are not perceived as stakeholders.

It is increasingly being recognised that inclusive education 'is part of a larger movement towards tackling social exclusion' and that 'a rights-based approach to education is consistent with providing support to the inclusion rather than to the segregation of children with a disability at school' (DFID 2000, p.12). Inclusive education is one of the best examples of inclusive development and has arguably made more progress than other sectors in promoting the inclusion of disabled children. This view is supported by international policy frameworks which promote EFA and UPE and the MDGs. In addition the UN CRC provides added strength to international efforts to ensure that children's rights to education are realised. In this way the move towards more inclusive practices for all children is being facilitated by this policy framework, as the Dakar Framework (Paragraph 19) reinforces:

'The key challenge is to ensure that the broad vision of EFA as an inclusive concept is reflected in national government and funding agency policies.'

(UNESCO 2000)

However there are very few countries in the world which have policies in place at national level which provide a clear direction on ensuring that education is inclusive of all children.

In addition international standards for protecting the rights of disabled people were set out by the United Nations in its Standard Rules on the Equalisation of Opportunities for Persons with Disabilities (United Nations 1993). Rule 6 emphasises that disabled people should be educated in integrated settings.

The Salamanca Statement and Framework for Action (UNESCO 1994) provided comprehensive guidance on the development of inclusive schools. It specified that all marginalised groups of children, not only disabled children or those identified as having special needs, should be included. The Salamanca Statement highlights the fact that inclusive education is a way of achieving EFA, and of promoting inclusive communities. Although the study focused on school-based education, the following quote from Article 2 of the Salamanca Statement emphasises the wider impact of promoting inclusive practices:

'Regular schools with this inclusive orientation are the most effective means of combating discriminatory attitudes, creating welcoming communities, building an inclusive society and achieving education for all; moreover, they provide an effective education to the majority of children and improve the efficiency and ultimately the cost-effectiveness of the entire education system.'

(UNESCO 1994)

Documented examples of inclusive strategies and programmes from a wide range of countries (UNESCO 2001) indicate that the move towards inclusive education is gathering momentum. However this movement is still disparate, with some countries having made considerable progress, while others have not even begun to think about the issues in any depth. It has been EENET's concern since its inception to promote the sharing of examples of inclusive education in order to encourage practitioners and policy makers to begin to develop inclusive practices, which focus on all children.

8.2 Policy development at national level

Great strides have clearly been made since the Jomtien Conference in 1990 developing national level policies which reflect the international level policy framework and provide opportunities for greater access and equity in education. Unfortunately, though, and not surprisingly, inclusive education has tended to be treated as an extension of special education, and policies at national level are often modelled on Northern examples.

It is quite common for policies on inclusive education to be developed independently of national education policies, or to be treated as a separate category. The national policies in Tanzania and Zambia are no exception. The current orthodoxy and dominant approach in many countries is that the training of specialists is a necessary part of promoting inclusion.

Our experience in this study shows that the training of more specialists is not the way forward, neither is it financially or logistically viable.

Instead, using external ideas to stimulate mainstream teachers to think differently about inclusive education, based on innovations in classroom practice and analysis by practitioners, can help them to think creatively about their own situation. In this way they can be supported to re-frame their existing problems and challenges and develop new ways of working, which can include the use of specialist expertise, where it exists.

The Government of Tanzania has a strong commitment to children in difficult circumstances as part of EFA. These include street children and other out-of-school children, and adolescent mothers. In recent years there have been conscious efforts in some districts towards developing inclusive education practices which have included disabled children, such as the one in Temeke district focused on in this study. Although the current policy context in Tanzania is generally conducive to the promotion of more inclusive practices in education, there is very little consistency of approach in practice. In Box 8 is a further example of this inconsistency between policy and practice,

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particularly with respect to the education of children identified as having special needs and disabled children.

Box 8: An example of gaps between policy and practice

The Curriculum Development Centre in the Ministry of Education in Zambia has produced and widely disseminated a 'Teachers' Curriculum Manual' (Ministry of Education, Republic of Zambia (2001). This provides excellent guidance to teachers about various aspects of their changing role, such as the need to respond to HIV/AIDS, gender issues, poverty and malnourishment, and to be aware of the principles of democracy and rights in education. Although the section on 'special educational needs' advocates integration and equal educational opportunities, and acknowledges that Zambian teachers have always taught children with a wide range of abilities, it also promotes a more medical model approach. This includes guidance on identification, treatment and referral of children who experience difficulties in learning, as well as those who have impairments which may affect their learning.

The implication of this approach is that such children may already be attending school, but that once they have been identified, given a diagnosis and treated, then alternative provision may be considered. If the impairment is considered 'severe' then separate specialist facilities are the recommended option, despite the fact that there are insufficient places in special schools and units for those children who could potentially be identified in this way, and too few specialist teachers.

The manual includes detailed information about the identification of children with difficulties in learning, but only a short section entitled 'practical tips for teachers and parents'. This does include the advice that teachers should consider the collaborative group activities in the classroom and establish home-school links. The practical implications, however, of the overall policy to integrate children categorised as having special needs in mainstream schools are considerable, in terms of teacher education, teaching and learning methodology, and initiating and sustaining change at school level.

8.3 Conceptualising inclusive education

One of the key policy issues to emerge from this study relates to the importance of adopting a social model approach to the education of marginalised groups.

If disabled children, and other marginalised groups of children, are to be offered an 'equal right to the "educational package", however basic that package may be' (DFID 2000, p.12), then it is essential that a social rather than a medical model is adopted, as the following quotation highlights:

> 'The medical definition of disability has been an important factor in conceptualising disabled people as "different" and has resulted in the provision of specialised solutions that emphasise that difference rather than promoting inclusion. Individuals with impairments are seen as the problem rather than the

inflexible attitudes, environment and institutions with which those individuals have to live.'

<div align="right">(Miles 1999, p.11)</div>

Encouraging teachers to think in terms of barriers to learning and participation of all children, rather than of the deficits and impairments of a few, will contribute to the promotion of more inclusive practice. This will also contribute to the increased quality of education of all children, rather than diverting valuable resources into expensive specialist resource facilities which are of questionable value. An inclusive school is the starting point for tackling social exclusion and promoting an inclusive society.

One of the main lessons that can be drawn from this study is the importance of developing a shared understanding about inclusive education.

We had not anticipated the extent to which the lack of a shared understanding and the conceptual confusion surrounding this issue was a major barrier to progress. The terminology used by research participants to describe disabled children, those identified as having special needs, and those who experience social exclusion and marginalisation differs across cultures, and gives some clues about the way in which these groups of children are regarded in society. The need to be conscious about the way language is used, and the need to encourage the use of positive language, was inextricably linked to the development of a shared understanding. The processes used in this study to explore this complex issue show potential in tackling this major barrier to inclusion.

Fixed ideas about inclusive education among education officials in Tanzania led to a long administrative delay in implementing the action research approach. Similarly, time was spent in all group activities to ensure that there was at least the basis of a common understanding of what the term meant to practitioners, in their particular context. Fragmented approaches to the inclusion of excluded groups, and of disabled children in particular, are often made worse by specialist agencies who have a vested interest in ensuring that children with a particular impairment or disability have access to education. Yet their expertise is valuable and could be used to greater effect by working in collaboration with mainstream teachers.

A lack of teacher ownership of the inclusive education process has been one of the findings of this study.

Since it has tended to be managed by specialists, very few mainstream teachers feel that it is their responsibility to teach children with diverse abilities, despite the fact that international policies suggest that education is the right of all children. National policies have perhaps given mixed messages on the particular issue of the education of disabled children and so have caused some conceptual confusion.

This study shows a possible way forward. Experimenting with a range of action research methods, and by working collaboratively with stakeholders, it was clear that the problems caused by a medical model approach are still widespread. The action research approach used in this study encouraged teachers to engage with these contentious issues and to develop their own conceptualisation, as a move towards the implementation of a social model approach to the education of marginalised groups of children.

8.4 Findings of the study

Our findings can be broadly divided into two main themes: the development of inclusive practice; and the methodology used in the study. However there are also some findings which relate to a combination of these two themes. The findings can be briefly summarised as follows, and will be expanded upon later in the chapter:

- The lack of a shared understanding about inclusive education is a major barrier to progress, and so the development of a shared understanding is extremely important.

- Listening to different voices was both a principle in the implementation as well as a methodological principle guiding the action research process (in particular: disabled people, children and their parents).

- Developing collaborative working relationships helped to establish a firm basis for the initiation of the action research process.

- Using a range of images in a systematic way can be a good way of bridging the gap between oral and literacy-based cultures, and of overcoming difficulties with literacy, and of using a range of different languages.

- Writing was used as a form of reflection, rather than as a form of accountability. The final written accounts were used as stimulus for further reflection and have potential to be adapted for use in teacher education programmes.

- A lack of teacher ownership of the inclusive education process by mainstream teachers was evident in one of the research sites, and resulted in a lack of confidence, reliance on specialists and a reluctance to take responsibility for children with a wide range of abilities. By contrast, where mainstream teachers had greater ownership of the inclusive process, they had increased confidence and were prepared to take more responsibility.

- The importance of context in determining the way inclusive education initiatives will develop.

Some of the processes used in the study to promote reflection will be discussed in the following section. These include: barrier analysis methods; the use of images; written accounts; working collaboratively; and listening to different voices.

8.4.1 Using barrier analysis

One of the central processes used in this study to help groups of people to analyse and write about their existing experience of trying to make education more inclusive was *barrier analysis*. This approach yields very different results from one which focuses on the deficits, or impairments identified in individual children. Instead practitioners focus on the factors in society which prevent learning and participation. We divided the types of potential barriers into attitudes, environment and institutions. In using barrier analysis methods, practitioners became aware of aspects of the educational process with which they were already familiar, and about which they needed to be reminded, and of which they knew nothing at all.

Analysing existing experiences using a barrier analysis approach was illuminating as it highlighted practitioners' interpretation of inclusive education and helped to confirm initial ideas about what prevents inclusion. The study enabled connections to be made between educational exclusion, absenteeism, high drop-out and failure rates in schools, and the challenges facing disabled children in the education system.

8.4.2 Images

From the evidence of this small study we have been able to demonstrate the effectiveness of using images to stimulate reflection. Photo-elicitation methods of engaging research participants in reflecting on their *existing experiences*, using images of familiar teaching and learning environments, proved to be both immediate and thought-provoking. It was also a way in which people with very different types of knowledge, skills and perspectives could think more deeply about their understanding and experience of inclusive education, as we set out to explore through our first research question.

One of the main issues to emerge from the photo-elicitation exercise was the relationship between the use of classroom space and inclusive practice. The teachers' reactions of surprise to the organisation of the classroom into groups rather than into rows indicated that their training so far in promoting inclusive practice had not raised the possibility of introducing change in the overall management of the classroom. Instead it had focused on the 'handling of individual disabled children'. The use of photo-elicitation methods to stimulate a discussion on the use of classroom space and teaching methodology attempted to break away from the more traditional ways of stimulating such discussions – using 'talk and text'.

From our limited experience in this study, it appears that using a range of images in a systematic way as part of the action research process can be a good way of bridging the gap between oral and literacy-based cultures, of overcoming difficulties with literacy, and of communicating using a range of different languages. Focusing on images complemented the 'talk and text' based action research methods. It also proved to be an inclusive approach to working in groups because images are accessible to people who have learning difficulties as well as those who have few literacy skills.

8.4.3 Writing

In the initial stages of the study the process of writing was regarded simply as one of several action research processes to help teachers record and reflect on their activities and experience. For some of the research facilitators and participants, the study provided them with their first experience of ***using writing as a form of reflection, rather than as a form of accountability***. Writing had been seen as an end in itself, but it came to be seen as a means of thinking about and evaluating inclusive practice and as a stimulus for further reflection.

Although the research team emphasised a social model approach to the issue of difficulties in learning, involving changes in structures and systems rather than in individuals, the teachers focused initially on individuals identified as vulnerable, at risk and/or excluded from education. By asking open questions about the situation of an individual facing a particular barrier, expertise has been developed among teachers who face a broad range of barriers to the inclusion of all children in education in their everyday work. This helped them to develop confidence in their understanding of the term inclusive education, and in developing appropriate responses, both in and out of the classroom. The majority of teachers who participated in the study had no training in special education. Researching and writing a case study about an individual, helped them to familiarise themselves with the particular social and learning needs of that individual, and in the longer term helped raise their awareness about inclusive practice and develop expertise.

Prior to the study, there had been an assumption that inclusive education was only about disabled children and it was considered to be the exclusive responsibility of special educators. Through their writing, however, some of the teachers made connections between their day-to-day experience of teaching children who did not fully participate in school as a result of being affected by HIV/AIDS, poverty, abuse, poor literacy skills, or simply because they were girls. The accounts also provided an insight into how the teachers interpreted the term 'inclusive education', and how the action research process helped them to develop such interpretations.

From the evidence and documentation of the action research activities that are available, we know that the use of photographs, and the recording of discussions related to classroom practice, were a successful way of engaging teachers and other community members in observing and reflecting on various aspects of inclusion and exclusion. Such recording methods are more in tune with oral culture and teachers found it easier to relate to experiences that they were watching, rather than experiences they were reading about. They also offer a permanent record of the process of research and reflection activities and of the facts and findings that emerge as a result of those activities. The use of video-based research and documenting offers a potential bridge between written and oral cultures, in the sharing of knowledge on inclusive practices.

8.4.4 Working collaboratively

The study highlighted the importance of developing collaborative working relationships as a basis for the initiation of an action research process.

For practitioners to enter into an agreement with action researchers which risks exposing failings in individuals, the system and government policy, a considerable level of trust is required. Investigating and exploring educational practice using a reflective process potentially exposes the way teaching and learning is conducted in schools and the way marginalised people in the community are treated. Identifying research partners who were able and willing to enter into this kind of research relationship, and who also had direct involvement in promoting inclusive education, was extremely difficult.

The study was ambitious in its aims of promoting a collaborative approach to action research, not only within a school, but between schools in the same community and between school communities in two countries facing similar challenges, while at the same time making connections with school effectiveness and improvement issues and recent moves towards inclusion in the UK. Regular opportunities to communicate ideas and research developments were essential, but were not always possible because of the nature of the remote management of the study. Ideas were shared, however, on a more regular basis between the clusters of schools in each country. The use of selected literature to inspire key members of the research team proved to be a useful way of developing a common language among the research facilitators and of sharing ideas about the process of collecting and reflecting on information.

The role played by both external and internal facilitators in introducing the action research activities, while at the same time engaging with the issue of inclusion, was crucial to the smooth running and success of the approaches that were developed. The external facilitators provided a stimulus to thinking and support with reflection, analysis and documentation; while the internal facilitators supported stakeholders intensively over a long period of time in a range of activities to promote their development as reflective practitioners. Sharing a common understanding about diversity and inclusion is a pre-requisite for this role, together with good communication skills and experience of group facilitation.

8.4.5 Listening to different voices

It has been widely acknowledged among the international NGO community committed to promoting disability work in the context of inclusive development, that 'self-advocacy by disabled people is one of the most effective ways of bringing about lasting attitudinal, environmental and legal or institutional change' (Miles 1999, p.12) and that target groups should be involved in the 'planning, implementation and monitoring of all disability and development work' (ibid., p.17).

Our first research question highlighted the need to bring together people with a wide range of different experiences, including disabled people and the parents of disabled children. Identifying disabled people who are well informed about educational issues and who are available to participate in such research activities proved to be particularly difficult, however, especially in the Zambian context. Although the research activities took place in and around a small provincial town, the teachers involved in the study had not heard of the existence of a national disabled people's organisation or of any parents' organisations. A disabled man had been involved in initiating the inclusive education work, but he had died and it had not been possible to identify another disabled person with his level of knowledge and commitment. This is perhaps not so surprising given the well-established cycle of disability and poverty, where poverty further disables people, and disability can lead to impoverishment (DFID 2000; Yeo and Moore 2003). The almost wholesale exclusion of disabled people from education over generations means that there are very few disabled adults who have the relevant education and experience to make a contribution to inclusive education initiatives.

The leaders of the national disabled people's organisations were consulted throughout the study in Tanzania, but there were few opportunities in the research sites to involve disabled people with relevant skills in the development of the research activities. The participation of deaf, blind and deafblind people in the first workshop in Tanzania, although extremely challenging to the facilitators, ensured that the language used and concepts discussed were made more accessible to the group as a whole. The more diverse the group, the greater the learning. A greater involvement of a disabled person's perspective would have added another dimension to the study.

8.5 Reflecting on the findings

The following section of the chapter is divided into two parts: a consideration of the usefulness of the teachers' written accounts to practitioners in other contexts; and the extent to which such activities led to the introduction of more inclusive practices.

8.5.1 The written accounts

The potential usefulness of the written accounts of these activities to practitioners in other contexts was a major motivating factor behind the action research approach adopted. Our third research question focused on the relevance of written accounts across cultures and contexts: 'How can the particular experiences of one community speak to a wider audience, and at the same time remain authentic?'. In developing accounts which have wider relevance beyond their community of origin, EENET has played a role over many years of 're-packaging' information for sharing to a wider audience through the newsletter and website. In this study it involved support with word-processing, thematic organisation, and design and layout, in order to influence policy makers and promote networking, and so that a further process of reflection could take place. This has enabled teachers to re-read their stories

and those of others in their newly re-packaged format, which in turn has led to a renewed interest in the action research process and in writing. The study highlighted, however, some of the potential difficulties of encouraging written communication in a context where there are many barriers to the sharing of that information.

The use of the written accounts as training material is currently being discussed. Their strength is that they start with existing indigenous knowledge and experience, and familiar contexts. They can serve several purposes: as a stimulus for further reflection; as in-service and pre-service training material; as inspirational material to be shared among wider audiences. The extent to which these accounts would serve such a wide range of purposes had not been anticipated prior to the study.

One of the unanticipated policy issues raised through the writing process, was the issue of poor school sanitation and its link with school drop-out rates and exclusion from education. This approach helped broaden debate beyond disability in education to inclusive development in a range of relevant sectors: accessible sanitation, transport, rehabilitation technology, etc. This demonstrated the potential of the approach in raising awareness of these broader issues and in developing a common understanding about issues of educational inclusion. There is room to develop this approach further.

8.5.2 Developing inclusive practices

The extent to which the action research activities led to the introduction of more inclusive practices is difficult to determine. However some examples are provided in the excerpts from the teachers' accounts in chapter six. For example, a teacher described the way she had gained confidence in her ability as a teacher of an inclusive class and how she had used her initiative to improvise classroom furniture for a child, who might otherwise have been referred to a specialist far away from Mpika.

Progress on the conceptualisation of inclusive education in the Zambian context was particularly well developed because so many pre-conditions for inclusion were in place prior to the study: a history of collaborative ways of working and of group problem solving through teachers' meetings; Child-to-Child principles were well established and helped in addressing attitudinal barriers to inclusion; some teachers had developed democratic practices in their classrooms including active learning in groups rather than rows, and students were involved in evaluating teachers' performance.

8.5.3 Teacher education and development

If UPE is to be inclusive and become a reality for all children, radical changes are necessary in the way teachers are educated. In particular, greater attention needs to be paid to the following:

- Structures need to be put in place to promote greater teacher collaboration.

- Teachers should be encouraged to collect, use and analyse evidence associated with their practice.
- Attention should be paid to making classroom arrangements more flexible.

The study also highlighted the following implications for formal teacher education programmes:

- Pre-service training should prepare teachers for the inclusive settings in which they will be working, rather than the specialist units which tend to see themselves as having a separate identity and structure from the rest of the school.

- There is a need for a combination of in-service training of mainstream teachers to enable them to respond to the new demands of inclusive classrooms; and innovations in pre-service training to prepare all teachers to be able to implement national policies on UPE for all children.

Although national policy guidelines in both Tanzania and Zambia advocate the education of all children, teachers are not being trained adequately for this new role. Furthermore the separate training of specialist teachers continues with little preparation on how to support mainstream teachers to cope with inclusive classrooms. It is perhaps not surprising, therefore, that in both countries mainstream teachers expressed their need for more training, preferably short, problem-based training, which would take place in the schools. These discussions revealed not only a need for teacher development, but also a need for practical examples of 'how to do inclusive education' – a commonly received request in EENET. There was an assumption expressed by the mainstream teachers that, if only they had some specialist training, they would be able to respond to the needs of the disabled children in their classes.

Yet written guidance on 'how to do inclusive education' supplemented with training courses, led by outsiders who have specialist expertise, tends to be the way that such educational change is promoted. The teachers in Tanzania had received this model of in-service training, but were still expressing their need for training and their lack of confidence in teaching children with learning difficulties, despite the fact that many of them were used to managing classes of over 100 children.

In contrast there were many examples of teachers who were being very innovative in their work, despite their lack of specialist training. The head teacher of one of the schools which has a unit for deaf children, for example, had learned sign language and set up a sign language club for the whole school to lessen the isolation experienced by the deaf children who were educated separately in the unit. Although the role of specialist teachers within inclusion was not a focus of this study, it is possible to draw some conclusions about the way in which their role has already begun to change with the development of more inclusive practice.

From the evidence of this study, we suggest that the training of more specialists is not the way forward in promoting more inclusive practices in education, neither is it financially or logistically viable.

In conclusion, the lack of a shared understanding about the meaning of inclusive education and its potential impact on the education system as a whole proved to be the overarching finding, and barrier to progress, in the study. The study demonstrated that there is enormous potential for practice to inform national policy on inclusive education, and so make it more meaningful and relevant. Key aspects of the process of making the policy more relevant include:

- improving and supporting local leadership
- listening to children
- school-school networking and the development of school clusters
- teacher-to-teacher communication and collaboration
- communication between head teachers and district level staff.

8.6 Looking to the future

8.6.1 Dissemination strategies

The issue of dissemination permeated the whole design of the study. One of the main aims was to work in ways which would make a direct contribution to the capacity building, development and sustainability of the participating education projects. Dissemination of the outcomes of the study has been done on an ongoing basis through EENET's newsletter and website, and through conferences and seminars.

Box 9: Discussions with policy makers

Discussions were held with key policy makers in both countries during the study. In Tanzania regular meetings were held between the internal facilitators and key MoEC officials throughout the study. This was relatively easy since the research site was in the capital, Dar es Salaam. In Zambia this was more difficult since Mpika is situated 600 kilometres away from the capital, Lusaka. In July 2002 the external facilitators had a meeting with the Permanent Secretary and the Inspector of Special Education of the Ministry of Education in Zambia to share information about the study. EENET has continued to correspond with the Permanent Secretary, who has recently requested permission to publish some of the teachers' stories from 'Researching our Experience' (*see Appendix 5*).

In addition to the ongoing dissemination activities, a formal dissemination strategy has been developed and will be implemented from November 2003 to May 2005, with financial support from DFID (EENET 2003d). The strategy is divided into two phases.

The first phase will involve the final production of a set of guidelines on how education practitioners can explore ways of improving the learning and participation of excluded groups at community level through a process of collaborative inquiry. The guidelines will be produced in the form of an interactive CD-ROM, which will also include a careful selection of additional resources on inclusive education, and an accompanying toolkit.

There is further work to be done in the development of the research tools and processes. For example, as part of the final set of guidelines, we intend to develop an approach to discourse analysis which is straightforward and easy to use. This will help teachers involved in teacher development and teacher training to become more attuned to analysing written information as part of their involvement in action research and in their daily work. As an integral part of this approach practitioners will be encouraged to think about what might be missing from such written accounts.

In addition to the production and further development of the guidelines, and their dissemination, there will also be an ongoing analysis of a range of dissemination approaches which will vary from country to country in order to critically reflect on some of the pitfalls and challenges of disseminating information about inclusive education effectively.

Our previous research indicates that there are particular problems associated with disseminating information on the issue of inclusive education and disability, which can significantly reduce the effectiveness of dissemination activities. The over-arching problem is the competing and confusing understandings of the term 'inclusive education' as outlined in Chapter 2. We intend to address the following key challenges, by developing, using and evaluating a range of dissemination approaches:

1. There are widely held pre-conceptions about inclusive education: that it is not part of EFA; and that a parallel specialist system of provision for disabled children should be developed, which, in turn, leads to a fragmented response.

2. There is a lack of involvement of Southern stakeholders in the production of training materials. There tends, therefore, to be little interest shown in materials disseminated.

3. There is a lack of joined-up thinking in the response to the large-scale exclusion of disabled children from education. Many international agencies – each with their own philosophies on disability, education and inclusion – are promoting different, sometimes conflicting, approaches. Rarely is there a co-ordinated response. This lack of joined-up thinking is often replicated at country/local level, where practitioners tend to work in isolation.

4. Inclusive education is often seen as a challenge to the vested interests of a range of agencies, many of whom are keen to keep specialist provision for disabled children, rather than to pool their resources in the interests of improving EFA.

Inclusive education is not only a complex and confusing concept, it is also controversial and much contested. Although we were aware of this at the beginning of the study, we had not anticipated the extent to which this conceptual confusion would continue to emerge as a major barrier to progress. Action research methods can play a part in promoting a shared understanding of this complex concept and clear guidance on how to carry out such collaborative research will help stakeholders in a wide range of contexts to develop their own methods and to internalise a clearer understanding of the challenge of overcoming exclusionary practices in schools and society as a whole.

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Appendix 1

The Enabling Education Network – EENET

> EENET is the only international network which provides exciting and useful information about including all children in education, focusing on income-poor countries.

Introduction

In this appendix we describe the role of EENET in promoting international dialogue about inclusive education, and in encouraging practitioners to see difference and diversity as opportunities for learning rather than as problems to be tackled.

One of the key reasons for the establishment of EENET – the urgent need for documentation on inclusive education in the South – was also one of the main motivations for initiating the action research study. The long-term aim of the project was to improve the quality of information that is shared through EENET's newsletter and website, particularly between similar contexts in Southern countries. Written documentation of instructive practice in inclusive education can be inspirational, informative and influential – especially when written by practitioners, rather than paraphrased and polished by outside researchers or development workers.

Dissemination has been a central part of this study, since it is an integral part of EENET's philosophy and day-to-day work. Information about this action research project has been disseminated through the newsletter, leaflets and posters. Since the beginning of the project there has also been a dedicated section on EENET's website, through which project-related documents have been shared. We invited EENET's readers to engage with the research project and to contribute their ideas. For example, the guidelines developed during the study have been shared with a wide range of EENET's advisors and supporters, and their feedback has been invaluable. The dissemination and impact of this action research is, therefore, potentially far greater than is the case with a conventional research project.

Respect for difference, the challenging of discrimination, accessibility of language, and the sharing of information are at the core of EENET's mission. Enabling changes within education structures, systems and methodologies is central to EENET's understanding of inclusion. Difference is seen as a resource rather than a problem, and schools which promote inclusion, (embrace difference and diversity), therefore become welcoming environments, rather than places in which children are labelled and experience discrimination. EENET believes that inclusive education is closely linked to social justice, democracy and human rights, and is not only an issue of disabled children's access to mainstream education.

What is EENET?

EENET is a participatory information-sharing network which supports and promotes the inclusion of marginalised groups in education worldwide. EENET provides easy-to-read information through its website and regular newsletter, and by responding to individual enquiries.

The network's mission is to encourage those working on the development of inclusive education in countries of the South to learn from each other's experiences and to share examples of instructive practice relating to the promotion of enabling education activities and systems. Supporting an action research approach to the promotion of inclusive education is, therefore, an integral part of EENET's work. By making accounts of instructive practice available to those who need them, EENET has successfully inspired practitioners in Southern contexts to promote more inclusive practices. Such accounts have more authority among readers in Southern contexts when they have been researched and written by practitioners from the South who have faced and addressed similar resource challenges to those faced by the readers.

Established in 1997, EENET is based in the University of Manchester's School of Education. It is, however, managed independently by a small international steering group. This group includes a disabled person, a parent of a disabled child and other network users from the South, donor and technical agencies from the North, and a representative of the University of Manchester. It is the role of the steering group to monitor ongoing work and guide new initiatives. As well as the formal steering group, there is a growing body of people who support and use EENET and who provide additional advice and direction on specific issues.

EENET is run by two salaried staff: a full-time Co-ordinator and a part-time Research and Development Worker. Most of its financial and technical support to date has come from development agencies committed to addressing disability as a development issue.

EENET provides a free service to teachers, parents, children, policy-makers, teacher educators, parents of disabled or other marginalised children and their organisations, disabled people's organisations, community development workers, academics, and national and international NGOs.

Priority is given to the needs of countries which have limited access to basic information and resources, primarily countries of the South. The network facilitates the flow of information and documentation originating in the South and encourages critical thinking and innovation. It focuses on the issues of gender, disability, race, ethnicity, poverty and HIV/AIDS as discriminatory factors in education, but it also promotes child-centred and participatory methods of teaching and learning as ways of overcoming discrimination and promoting inclusive education.

Why EENET was established?

EENET was set up to respond to the networking needs of inclusive education practitioners. These needs were identified by Save the Children UK's Global Disability Adviser. Save the Children UK's early work in the area of inclusive education revealed that there were some excellent examples of inclusive practice in the South, but that they were little known and little published. It was also clear that resource materials about inclusive education were in short supply, and that there was a need for more locally produced training packs in appropriate languages and in accessible formats, such as Braille, large print, audio and video tape, etc.

Although the initial inspiration for the establishment of EENET came from the work of Save the Children UK's global disability programme – and the key people involved in setting up the network all had professional backgrounds in special education – there was a commitment from the beginning to ensure that EENET maintained a *broad* understanding of the term 'marginalisation from education'.

From the beginning disability and 'special needs' have been seen by EENET as inextricably linked to issues of poverty and gender discrimination. The challenge of inclusion has not only been to address the difficulties faced by individuals, but to consider the changes that need to take place in education structures and teaching methodology, if learners are to be included in, rather than marginalised from education.

It has been argued that disability is both a cause and a consequence of poverty (DFID, 2000), and EENET certainly sees the promotion of inclusive education as part of a broad strategy to reduce poverty, and to promote equity and access to education for all. By supplying teachers, parents, children and policy-makers with information on education and inclusion, EENET is indirectly supporting the development of better education for children all over the world – the kind of education which can help break the cycles of discrimination and poverty. In this way EENET is helping to ensure that the international MDG of Education for All by the year 2015, really means *all* children.

Many mainstream teachers feel that they do not have the necessary 'specialist' skills or equipment to teach disabled children. EENET has gathered evidence from many countries, however, which demonstrates that the main barrier to progress is negative attitudes and lack of information, rather than lack of resources or equipment. There are plenty of examples of schools in poor communities, where the lack of resources does not stop them admitting disabled and other marginalised groups of children. EENET also has examples showing that having disabled children in class does not result in lowering standards, as is often feared, and can even lead to improvements in teaching practices throughout the school. EENET was set up to share these sorts of lessons and encourage this kind of confidence and understanding.

EENET:
- believes in the equal rights and dignity of all children

- prioritises the needs of countries which have limited access to basic information and resources

- recognises that education is much broader than schooling

- acknowledges diversity across cultures and believes that inclusive education should respond to this diversity

- seeks to develop partnerships in all parts of the world.

In conducting its work EENET:
- adheres to the principles of the Salamanca Statement

- believes that access to education is a fundamental right

- recognises the intrinsic value of indigenous forms of education.

EENET is committed to:
- encouraging the effective participation of key stakeholders in inclusive education

- engaging with the difficulties caused by the global imbalance of power
- encouraging a critical and discerning response to all information and materials circulated.

Why 'enabling' education?

The decision to call the organisation the *Enabling* Education Network, rather than the Inclusive Education Network, was a very conscious one. The term 'inclusive education' has become almost exclusively associated with disability and so-called 'special needs' education. EENET wanted to ensure that its name would convey a more comprehensive vision and understanding of inclusion in education. 'Enabling education', hopefully, expresses a broader concept, than 'inclusive education' and as such may remain a more widely appropriate and accepted term for far longer. The word 'enabling' was also chosen in a deliberate attempt to highlight the often 'disabling' nature of some forms of educational provision. The word 'enabling' offers a strong contrast to 'disabling'.

Enablement and empowerment are therefore closely linked. Education should be empowering to all children, but sadly it can be a disabling factor in their lives. Disabling educational environments affect all children - not only those identified as having impairments.

This being the case, EENET is both promoting enabling education and enabling education practitioners to develop their practice by providing easy-to-read and relevant information. EENET starts from the assumption that information is power, as knowledge is also power. Access to information is

therefore empowering; sharing this knowledge and information is what leads to progress.

EENET's experience in all its work (not just in choosing a name) is that the careful use of language is crucial when communicating with culturally diverse countries. Choosing the most appropriate words to describe people who have impairments, and being sensitive about the way we portray countries with few material resources, are similar and related challenges. Since information is power, it is essential that words are chosen carefully and with respect. Respect for difference and diversity is at the heart of inclusive education, and the *way* we communicate, not only *what* we communicate, can have a great impact.

EENET's existing networking and information systems

EENET is involved in ongoing dissemination activities, serving educational practitioners, primarily in the South. This involves the free distribution of training materials, newsletters, CD-ROMs and website documents in hard copy, to those who have limited access to information and who may also require accessible formats, such as Braille, large print, audio or video tape. EENET continues to disseminate primarily in hard copy, since for many users email and Internet access is unreliable and expensive, and the cost of printing out electronically received documents is too high.

For those who do have access to the Internet, EENET's website provides free materials on a diverse range of issues. Website hits peaked in November 2003 at 172,500 hits and 15,200 user sessions per month; more than double the numbers recorded in the previous year. Many Southern countries – including South Africa, Brazil, Chile, Peru and the Philippines – now regularly appear in the top 15 of user countries. In approximately 20-25 per cent of cases it is not possible to ascertain the user's country. It is likely that many of these users will be from countries of the South.

EENET engages in regular correspondence, both by slow mail and email, with individuals and organisations in over 100 countries, more than 80 of which are in the South. Increasingly, those who correspond seem to be progressing from handwritten letters – which can take months to arrive – to the use of email communication, although for many this still remains impossible.

Definitions of inclusion

EENET has played a pivotal role in promoting discussions of definitions of key terms associated with inclusive practices. A formulation agreed at a seminar held in Agra, India in 1998 (jointly organised by the International Disability and Development Consortium and EENET) offered greater clarity regarding the elements that make up inclusive education (EENET 1998). The Agra definition has since been used to inform the definition of inclusive education adopted in the South African White Paper on Education (see Department of Education 2000).

In carrying out its work, EENET's overall approach to inclusive education is based on the following assumptions:

- all children can learn

- inclusive education is a dynamic process which is constantly evolving

- differences in children, such as age, gender, ethnicity, language, disability, HIV and TB status, should be acknowledged and respected

- education structures, systems and methodologies should be developed to meet the needs of all children

- such developments should be seen as part of a wider strategy to promote an inclusive society

- progress need not be restricted by large class sizes or a shortage of material resources.

(EENET 1998)

Key EENET activities

EENET offers:

- an information-packed newsletter, 'Enabling Education', published annually and circulated free in English hard copy to a subscription list of 1,700 people and distributed to an additional 3,000 people in the course of the year. Selected editions are also available electronically in French, Portuguese and Spanish and also in Braille/audio-cassette format

- the world's most comprehensive website on inclusion issues in education – www.eenet.org.uk – containing posters, reports, guidelines and training materials, from a variety of sources. Issues include: inclusive education policy and practice for a range of marginalised groups; teacher education; early childhood issues and child-to-child work; the role of parents; action learning; and a section on deafness and the education of deaf children. An increasing number of documents is available in other languages, including Portuguese, French, Arabic and Spanish

- an information provision and advice service, responding to a large number of e-mail, postal and telephone enquiries and leading to on-going contact with individuals and organisations in over 100 countries

- assistance in developing regional or local information networks in the South, which can reach more people and provide more locally appropriate information. Regional networks are currently being developed in Latin America, West Africa and Portuguese-speaking Africa

- dissemination of easy-to-read and easy-to-use training materials, including booklets, posters, videos, CD-ROMs and audio-cassettes. EENET produces its own materials and also assists in the development or redesign of materials created by other organisations, in order to make them more relevant or useable around the world.

- free materials to South-funded organisations and individuals.

Appendix 2

Mind-maps

Mind-mapping is a successful way of displaying key ideas in a visual image since it reflects the way that our brains work. There is considerable evidence to suggest that the brain does not store information in a linear system of lists, but in a complex, multi-dimensional coding system based on key concepts and patterns of information (Buzan 1974).

A mind-map is a way of organising thoughts, ideas or themes on paper in a pattern, rather than in a list. Usually you start with a central point which leads to lots of other ideas. Some people call these spider diagrams and they may look something like this:
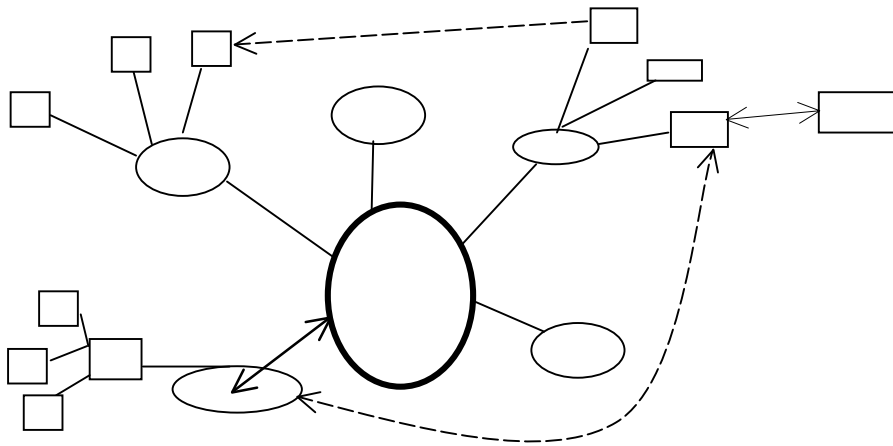
It is easier to see the connections between ideas in a mind-map than it is when you make a list. You can also highlight ideas that are more important than others with colour or size, and use arrows to show the links between ideas.

Brainstorming a mind-map: usually a brainstorm leads to a list of ideas compiled in a short time. However it is also possible to record the results of a brainstorm as a mind-map, and perhaps move into a discussion of some of the ideas. A mind-map may sometimes offer a more useful reminder of a discussion than a list of notes or minutes.

Appendix 3

Communicating ideas through literature

Oral culture

This guide to collecting, interpreting and using oral testimony (Slim and Thompson, 1993) was one of the most well-used documents in the Zambia research site. The book provides practical advice to help development workers improve their listening and learning skills, and on methods of collection, recording, transcription and translation.

The use of images

A critique of the way development workers have produced visual aids is provided by Linney (1995). He suggests that images can be used to promote a more equal distribution of power, by using a liberating, people-centred approach to improving visual literacy in Southern communities. This book helped the research team to think more carefully about image-based research from a development perspective.

Participatory learning and action (PLA)

The original set of guidance notes produced for the first workshop in Tanzania in July 2001 drew heavily on PLA (Chambers 1999), which is described as 'a growing family of approaches, methods and behaviours to enable people to share, enhance and analyse their knowledge of life and conditions, and to plan, act, monitor and evaluate'. PLA principles were very influential in developing the original research proposal.

Children's participation in action research

The guidance notes also drew inspiration from a booklet produced by ENDA (1993) which includes practical examples of how children can be involved in action research activities. Such practical guidance in text form was not sufficient, however, in giving the Zambian teachers confidence to involve children in their research activities.

Using PLA in inclusive education research

PLA principles have rarely been applied to formal education, and even more rarely to the challenge of disability and difficulties in accessing PLA tools and methods because of difficulties in seeing, hearing, understanding or moving. By involving disabled children in evaluating their own experience of inclusive education, using PLA, Stubbs (1995) conducted an in-depth study of the national integrated education programme in Lesotho.

Developing inclusive policies, practices and cultures

The Index for Inclusion (Booth et al, 2002) is a set of materials to support schools in a process of inclusive school development. It encourages the involvement of all stakeholders in education and is concerned with improving educational achievement through inclusive practice. By encouraging stakeholders to share experience and build on their existing knowledge about barriers to learning and participation, it assists them in exploring the possibilities for improving learning and participation.

Appendix 4

Action learning poster

Appendix 5

Letters from the Ministry of Education, Zambia

REPUBLIC OF ZAMBIA

MINISTRY OF EDUCATION

P.O. BOX 50093
LUSAKA

July 14, 2003

EENET Coordinator
Enabling Education Network
C/O Education Support and Inclusion
School of Education
The University of Manchester
Oxford Road
Manchester M13-9PL
UNITED KINGDOM

Attention: Susie Miles

RE: RESEARCHING OUR EXPERIENCE

Thank you very much for the above mentioned document, which you forwarded to us as earlier requested. We have studied the document and found it very revealing on a number of issues particularly regarding over enrolment, absenteeism and barriers to participation.

We would be happy if experiences documented in this research are disseminated to a wider audience. I would therefore like to request you to allow us publish some of these articles in the Ministry's Newsletter which is produced quarterly.

B Y Chilangwa (Mrs)
PERMANENT SECRETARY
MINISTRY OF EDUCATION

OFFICE OF THE PERMANENT SECRETARY
P.O. BOX 50093
LUSAKA

8 May 2003

Ms Susie Miles
Enabling Education Net, Co-ordinator
University of Manchester
Oxford Road, Manchester M13 9P1
UNITED KINGDOM

Dear Ms Miles

re: **EENET'S WRITING WORKSHOPS PROJECT, MPIKA, ZAMBIA**

I wish to acknowledge receipt with thanks your letter dated 28 April 2003, the action learning report and the newsletter on Enabling Education Network (EENET) on the Mpika Project.

I look forward to receiving the other publication entitled '**Researching Our Experience**' which is a collection of teachers' writing organized thematically and addressing the issue of inclusion and exclusion in education.

Yours sincerely

Barbara Y Chilangwa (Mrs)
Permanent Secretary
MINISTRY OF EDUCATION

Appendix 6

'Enabling Education' newsletter article

Action-learning for Inclusion
Understanding Community Initiatives to Improve Access to Education

EENET started a 2-year action-learning project in April 2001, funded by the UK Department for International Development (DfID). Its aim is to help people who are involved in promoting more inclusive practices in education to learn from their experience of inclusive practice; document it; and share it with other people. The project focuses on school communities in Mpika, Zambia, and Dar-es-Salaam, Tanzania. In this article Susie Miles gives a flavour of some of the work so far.

In July 2001 a 2 day workshop was held in Dar-es-Salaam to explore the 'research' methods. Colleagues from Zambia and UK were involved. In order to simplify the concept of 'research' we asked three key questions, 'What', 'How' and 'Who'.

1. **What are the barriers to children's participation and learning?**
    *   What knowledge already exists?
    *   What type of additional information do you need?
    *   How will you collect it?

In order to identify barriers to inclusion, we used mind maps as a tool.

2. **How can the barriers identified be addressed?**
    *   What strategies have already been used?
    *   What other strategies might be useful?
    *   How can these be introduced?

In order to formulate strategies to address barriers, we used a variety of interview techniques.

3. **Who needs to be involved?**
    *   Who has been involved so far?
    *   Are there others who might contribute?
    *   What actions are needed to strengthen their involvement?

In order to identify who should be involved, we used brainstorming – or 'Bunga Bongo', in KiSwahili.

Main aim: Supporting communities to produce their group stories of participation and learning.

BY
*   Using existing knowledge
*   Building on experience
*   Collecting information
*   Working together
*   Listening to different voices
*   Creating conversations

To encourage reflection, learning and the sharing of knowledge.

OUTCOMES
1. Accounts of inclusive activities.
2. Evidence of impact on practice.
3. Detailed notes on processes used.

Salvation Army and Mgulani primary schools: A mind map

Key questions

- How can people be helped to think about, document and learn from their own experience to improve access to learning for all?
- How can we make this process empowering - particularly for practitioners and people from marginalised groups?
- How can the particular experiences of one community speak to a wider audience?
- How can 'outsiders' and 'insiders' best work together to improve practice?

Discussions in schools revealed the following reasons for children not attending school in Dar-es-Salaam:

- Orphaned children;
- Children 'in difficult circumstances' (the preferred term for street children);
- Over-age children;
- Children who were not happy about the severe punishments they received;
- Children who find the increased number of subjects too difficult from Grade 4 onwards;
- Children who are fed up with the overcrowded classrooms and having to sit on the floor;
- Children whose parents are sick and dying;
- Girls who become pregnant from 12 years – 3 out of 50 every year;
- Boys who feel 'too big' for school – 10-11 years onwards;
- Boys, mainly, who become involved with 'street activities' such as drugs.

Action-learning in Mpika, Zambia

Encouraging teachers to reflect upon their practice has been the greatest lesson learned from the action-learning project so far. Paul Mumba has been working with 8 school communities in the Mpika area, in his role as school-based In-Service Provider for Kabale School, using the methods tried out in Tanzania.

Teacher reflection

Interviews have been recorded with teachers on audio-cassette, brainstorming has been used to facilitate group discussions, and the management of meetings with parents has been reflected upon using video. Paul is writing an account of the action-learning process. Paul's account will be 'negotiated' with the key stakeholders (children, parents and teachers) and then shared with the whole community.

Activities with children:

Girls and boys have taken photos of their group activities in the classroom and in the community. A class of girls has conducted a community survey to find out why so many girls are frequently absent from school, and the stigma surrounding HIV/AIDS has been role-played in lessons.

The methods used in Tanzania and Zambia will be written up as a set of guidelines for other communities to use by the end of 2002. If you are interested in trying out the guidelines, please contact EENET.

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Appendix 7

Kabale Basic School: 1996-2003. A case study

> 'Significantly, by the end of the funded stage of the [MIEP] project, three quarters of the teachers with a special education background had become trainers and resource people, and were opposed to the retention of special units. Also, teachers with no specialist training displayed skills and ingenuity in working with children with additional needs.'
>
> (Child-to-Child Trust 2003, p.8)

A community survey, conducted in 1994 by an expatriate nun, brought to light the existence of children with intellectual disabilities who were not accessing education. The survey also revealed the feelings, or assumptions, in the community that these children cannot learn.

In 1995, school children conducted a child-to-child survey, with the encouragement of their teachers. Over 30 children with learning difficulties were discovered, confirming the findings of the survey in 1994. All the children identified in the survey were encouraged to come to school, and, over a period of time, the teachers established ways of supporting them in the main school so that they did not have to be separated from their peers.

At this time Kabale did not have a unit or any teachers with 'specialist' training, but it was a large school with 40 teachers. A donor agency found out about the work that was being done with the disabled children and decided to build a unit and recruit a teacher. The decision to open the unit was made without consulting staff members at the school. The building of a new, rather luxurious, classroom with windows and doors came as a surprise to the teachers, since they were used to teaching in quite dilapidated and sub-standard classrooms.

The 'unit for mentally retarded children' was opened at Kabale Basic School in 1996. A teacher from within Mpika district, who had just completed a special education course, was transferred from his present school to become the unit's first teacher. The teacher was responsible for four children, ranging from seven to 12 years old. Although the unit was initially aimed at children with learning difficulties (often referred to as 'mental retardation'), children with visual, hearing and physical impairments were also included. Yet the teachers in the main school were used to coping with as many as 65 children in their classrooms. The fact that the specialist teacher became known as the 'Teacher of the Fools' was an indication of the very separate nature of the unit. The label given to the teacher mirrored the labels given to the pupils with intellectual disabilities and revealed the commonly-held view that such children were not expected to attend school, and that their attendance in school was considered a waste of resources.

In 1997 a twinning initiative was started, as part of the Child-to-Child programme, with the aim of breaking down the isolation experienced by the children in the unit. So-called 'non-disabled' children were twinned with disabled children in the unit on a one-to-one basis. Initially this was a one-way relationship where the non-disabled children saw themselves as helping the children in the unit. Later, through the efforts of the Mpika Inclusive Education Programme (MIEP) this became more of a two-way relationship.

When the unit was first established, it was recommended that hearing impaired pupils should attend the residential unit for hearing impaired and deaf children, situated seven kilometres away. The parents agreed, but later two parents insisted that their children should return to Kabale school in order to remain in their home communities, and reduce the risks associated with travelling. The parents help the teachers at Kabale school if there are any communication problems, and the teachers have learned how to teach the deaf children. The two visually impaired children identified were sent to a school for blind children 470km away.

By this time enrolment of pupils in the unit had reduced, since many of them wanted to remain in the mainstream where they had been happy in their social interactions and had worked well with their fellow pupils. Yet a second specialist teacher had been appointed to work in the unit. A meeting was held in January 2001 between the two specialist teachers and the Co-ordinator of the MIEP, and it was decided that the school should become totally inclusive. The two specialists worked closely with the regular teachers to support their practice of inclusion. Every Friday meetings were held to discuss the week's experiences, and to help and advise each other, where possible.

The MIEP teachers worked hand-in-hand with the special education teachers to establish ways of supporting those children identified as having special educational needs in the mainstream, using Child-to-Child methods and activities. Problems have sometimes arisen when pupils have left their previous grade and teacher at the end of the school year, and moved up to a new grade. The new teacher may not want to support or help them. One teacher said: 'If he insists in remaining in this class, I will not do anything to help him, for there is literally nothing I can do for him.'

In September 2001 the school received a grant from the Ministry of Education to assist the unit. A meeting was held to discuss the future of the unit, and the majority of the teachers (especially those who were not teaching the disabled children in their classes) supported the idea that the 'special' children should go back to the unit. This was also the wish of the school administration as it was seen as a way of ensuring that the school would continue to receive the grant from the government.

By 2001 there were three specially qualified teachers. One of the specialist teachers readily went back to the unit, where she taught only four children. But the rest of the children refused to go back. The other two specialist teachers continued to work as resource teachers in the main school, each having full responsibility for a class of their own, as well as the additional

responsibility of supporting those with additional learning needs in the mainstream. Also, some parents insisted that their children go back to the unit, despite the children's wish to remain in the mainstream.

At the time of writing this case study, the majority of the disabled children were included in the regular classes, although the unit still officially exists.

> 'Children with disabilities need to be included, not in units, but in normal classes, for after they have left school the world, society and communities do not have units.'
>
> Mr Kaoma, Specialist teacher, Kabale

This case study was written by Paul Mumba, with Susie Miles, 2001.

Useful publications

Inclusive education – general

Alur, M. and Hegarty, S. (eds.) (2002) *Education and Children with Special Needs: From Segregation to Inclusion.* New Delhi: Sage Publications

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Readers wishing to obtain items listed in this appendix, especially those which are not formally published or available on the Internet, are invited to contact EENET, as we have many of the items available for photocopying.