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# Middle school teachers perspectives on inclusion: a qualitative study

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FLORIDA INTERNATIONAL UNIVERSITY

Miami, Florida

MIDDLE SCHOOL TEACHERS PERSPECTIVES ON INCLUSION:  
A QUALITATIVE STUDY

A dissertation submitted in partial fulfillment of the  
requirements for the degree of

DOCTOR OF EDUCATION

in

CURRICULUM AND INSTRUCTION

by

James M. Cooney

1999



To: Acting Dean Robert Vos  
College of Education

This dissertation, written by James M. Cooney and entitled Middle School Teachers Perspectives on Inclusion: A Qualitative Study, having been approved in respect to style and intellectual content, is referred to you for judgement.

We have read this dissertation and recommend that it be approved.

John A. Carpenter

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Valerie J. Janesick, Major Professor

Date of Defense: July 9, 1999

The dissertation of James M. Cooney is approved.

Acting Dean Robert Vos  
College of Education

Dean Richard L. Campbell  
Division of Graduate Studies

Florida International University, 1999

## DEDICATION

I dedicate this dissertation to all of the teachers at Malcolm X Middle School, the real heart and soul of the school. With unflagging patience and understanding, they challenge and empower their students each and every day.

## ACKNOWLEDGMENTS

I wish to thank all of the members of my committee for their invaluable comments and assistance. I also want to thank the following people: Ms. Mercedes Stanley, the principal of Malcolm X Middle School, for her understanding and patience; and, my dear friends Bob and Rhonda Pfeiffer who helped me to persevere whenever my energy seemed to be running low.

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# ABSTRACT OF THE DISSERTATION

## MIDDLE SCHOOL TEACHERS PERSPECTIVES ON INCLUSION: A QUALITATIVE STUDY

by

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Florida International University, 1999

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Historically, research has placed considerable emphasis on developing a systematic body of knowledge about education in which little voice has been given to teachers themselves. The critical role that teachers play in this generative process such as reflecting, acting and theorizing upon practices that shape life in the classroom has largely been ignored in favor of technical innovation and organizational procedure. As schools struggle to reform and restructure, an understanding of how teachers interpret their practices in context and how the culture of schools influence, constrain, or encourage these practices become critical aspects of school success or failure.

This study examined the perspectives on inclusion of seven middle school teachers as they attempted to include exceptional students in regular classes. The study utilized three forms of data collection: observations were made of participant interactions as they led their everyday school lives; document analysis was used as a means to gain an understanding of programs affecting exceptional students, and interviews were used

to give voice to teacher's perceptions regarding inclusion, allowing description in their own words rather than those imposed by an outside inquirer. Data collection and analysis sought to identify emerging themes, categories and patterns, allowing for the creation of substantive theory grounded in empirical data.

The key issues that emerged in the study were considered in terms of three general categories. The first, teaching and learning, revealed stark contrasts in opinions regarding the type of human support thought necessary for successful inclusion. Regular educators clung to the traditional notion of solitary teachers directing all class activity, while exceptional educators preferred a more team-oriented approach. The second, school structure, revealed that highly collaborative structures were only partially successful in creating additional conversation between regular and exceptional educators. Collegiality was affected by lack of staff experience with the process as well as its implementation in a top-down fashion. The third, school culture and climate, revealed that regular educators believed the school was prepared for a limited amount of inclusion. Although exceptional educators acknowledged school readiness, they did not believe that inclusion was an important item on the school's reform agenda.

## TABLE OF CONTENTS

CHAPTER	PAGE
I.	INTRODUCTION..... 1
	Background..... 1
	The First Wave..... 2
	The Second Wave..... 11
	Statement of the Problem..... 13
	Purpose and Scope of the Study..... 17
II.	REVIEW OF RELATED LITERATURE..... 19
	The Implementation of Educational Change..... 20
	Early Reform Attempts..... 21
	Rising Expectations..... 22
	Equality and Education..... 25
	Durability of Core Practices..... 27
	Cycles of Change..... 30
	Incoherence of Reform Policy..... 32
	Intractable Nature of Schools..... 34
	Teachers React..... 35
	Impact of Voice..... 38
	Historical Context..... 40
	1890-1950..... 41
	1950-1990..... 46
	1990's..... 52
	Summary of Planned Educational Change..... 59
	The Implementation of Special Education Reform..... 61
	Historical Context..... 62
	The Impact of Educational Change on Special Education..... 73
	Current Inclusive Issues..... 79
	Summary of Special Education Reform..... 84
III.	METHODOLOGY..... 86
	Qualitative Inquiry..... 86
	Purposive Sampling..... 94
	The Role of the Researcher..... 96
	Data Collection and Recording..... 102
	Interviews..... 102
	Observations..... 103
	Document Analysis..... 105

Data Analysis.....	105
Evaluation of the Study.....	107
Summary.....	113
IV. PRESENTATION OF THE DATA.....	116
The Context.....	117
The Community.....	117
The District.....	122
The School: Setting and Context.....	127
School Safety.....	128
Student Growth and Access to Technology.....	129
Forces Impacting on Student Achievement.....	131
Structural and Cultural Issues.....	134
Comprehensive Management System.....	135
Forces Behind Change.....	141
Impact of State Reform.....	142
State Goals.....	144
School Improvement.....	145
Local Flexibility.....	146
Performance Indicators and Reporting.....	147
Accountability for Results.....	147
Sunshine State Standards.....	149
Strategic Plans.....	152
Funding Issues.....	154
Impact of National Efforts.....	155
The 1997 Amendments.....	156
Least Restricted Environment Revisited.....	158
The OCR Visit.....	161
Procedural and Structural Issues.....	164
Summary of Contextual Issues.....	168
The Participants.....	170
Teacher Perspectives: The Regular Education Teachers.....	173
Gene's Perspective.....	173
Linda's Perspective.....	184
Teacher Perspectives: The Exceptional Education Teachers.....	199
Karen's Perspective.....	199
Bob's Perspective.....	214
Jane's Perspective.....	225
Susan's Perspective.....	236
Catherine's Perspective.....	247
Summary of Participant Issues and Concerns.....	253
Emergent Categories.....	253
Teaching and Learning.....	254
School Structure.....	256

School Climate and Culture.....	258
Models of Inclusion.....	260
Model One: Content Focused Inclusion.....	260
Model Two: Location Focused Inclusion.....	261
V.    SUMMARY, CONCLUSIONS and RECOMMENDATIONS.....	266
Inquirer's Construction of Key Issues.....	266
Teaching and Learning.....	267
School Structure.....	276
School Climate and Culture.....	279
Models of Inclusion.....	281
Location Focused Inclusion.....	282
Content Focused Inclusion.....	283
Summary of Key Issues.....	285
Inquirer's Conclusions.....	289
Inquirer's Reflection on the Study.....	297
Recommendations for Further Research.....	299
LIST OF REFERENCES.....	302
APPENDICES.....	324
VITA.....	330



## LIST OF TABLES

TABLE	PAGE
1. List of Categories and Codes.....	108
2. Broward County Population by Race.....	119
3. Ancestries Reported in Broward County.....	121
4. School Board of Broward County Student Population by Race.....	124
5. 1998 Stanford Achievement Test Scores for Malcolm X Middle School.....	133
6. Gene's Perspectives on Inclusion.....	185
7. Linda's Perspectives on Inclusion.....	198
8. Karen's Perspectives on Inclusion.....	216
9. Bob's Perspectives on Inclusion.....	227
10. Jane's Perspectives on Inclusion.....	235
11. Susan's Perspectives on Inclusion.....	246
12. Catherine's Perspective on Inclusion.....	252

# CHAPTER I

## INTRODUCTION

Without an understanding of our history and the bravery to confront exceptionalism for what it is - difference that demands an extraordinary response - our sincerest efforts to do good can turn easily into mockery.

James M. Kauffman, 1997

### Background

Public education in the United States has been the object of profound, recurring criticism throughout most of the twentieth century. This critical examination has focused not only on the Spencerian question, "What is worth knowing?" (Spencer, 1861) as well as its correlates, "How?" and "Why?" (Schubert, 1986). Attention has also focused on the roles played by both teachers and students alike as they deconstruct and reflect on the meaning-making processes that dominate everyday life in the classroom.

Such critical examination has brought forth what seems to be an endless call for school reform. Policymakers have responded to public criticism with ready explanations for why schools are so hard to change and why previous reforms have failed. These recurring waves of school reforms have become so familiar as to enter the folk wisdom of policymakers and practitioners alike (Cuban, 1990a).

Perhaps the watershed event of the current school reform movement was the publication of A Nation at Risk (National Commission on Excellence in Education,

1983). The publication of the report by Terrell H. Bell, Secretary of Education in the Reagan administration, may be considered the beginning of the excellence movement in public education. The release of A Nation at Risk jolted the United States into a frenzy of school reform activity. Between 1983 and 1985, legislatures enacted more than 700 statutes stipulating what should be taught, including when, how, and by whom it should be taught (Futrell, 1990, p. 260). Many of the reforms were locally sponsored as school boards attempted to refocus priorities and rewrite educational policies. However the overwhelming majority of the reform initiatives emanated from state governments, especially state legislatures. Through 1984, and beyond, education became a dominant issue in state capitols nationwide (Toch, 1991, p. 36).

### The First Wave

A Nation at Risk was instrumental in ushering in the first wave of school reform; an effort characterized by top-down, state mandates calling for more of everything: certification tests, credits for graduation, hours and days in school. The establishment of these standards represented a profound and unprecedented shift in educational practice in this country. In its two and a quarter centuries, the United States had never had explicit education content or performance standards (Smith, Fuhman & O'Day, 1994, p.12). Perhaps of even greater importance, were the reports' influence in defining what role public education should play in the life of the country as the twenty-first century approached. A Nation at Risk defined education in terms of its *instrumental* value rather than its *intrinsic* value (Futrell, 1990). According to the report, the mission of education

should be one of serving the national interest. A Nation at Risk took on an almost militaristic tone in its description of the effect years of neglect and "dumbing" down of schools had on the quality of education in the United States:

If an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war. We have, in effect, been committing an act of unthinking, unilateral, educational disarmament (National Commission on Excellence in Education, 1983).

The intent of A Nation at Risk was to attract the attention of the American people of the need to rally around their schools (Bell, 1993). However, the report emphasized the problems of American schools rather than detailing possible causes or educational cures. The report treated teachers as one of the most fundamental problems facing public education. In his analysis of A Nation at Risk, Maeroff (1988) reported "findings regarding teaching were all negative" (p. viii). Ten years after the publication of A Nation at Risk, Bell apologized for this negative representation of teachers stating, "No one intended for teachers to receive the blame that was heaped upon them" (Bell, 1993, p. 593). However, teacher "deficiencies", in terms of pedagogy, knowledge of subject matter, or both, were thought to be factors that could be easily remedied by official mandate. The contemporary paradigm of teacher as puppet was best illustrated by Maeroff (1988) as he lamented, "It is as if teachers are a part of the inanimate classroom - like the books, the desks, the computers and the chalkboard" (p. xiii). National reaction to A Nation at Risk perpetuated this teacher deficiency model. If student achievement was to increase, it would first be necessary to "reprogram" teachers to compensate for any deficiencies by having them deliver redesigned, "teacher-proof" curricula in the

classroom. Pinar (1992) characterized this state of teacher as delivery person as, "being dreamt into existence by others" (p. 228). The assumption that teachers had a point of view and a capacity for self-evaluation, qualities that might enable them to play an important role in the meaning-making process of the school, had yet to be considered valid by contemporary school reformers.

As implementation of the new state standards progressed, disenchantment developed with the first wave of school reform and its quest for excellence. One underlying assumption of this quality driven paradigm was that schools are bureaucracies run by carefully specified procedures that yield standard results for both teachers and students. Based on faith in rationalistic organizational behavior and in the power of rules to direct human behavior, twentieth-century school reform has assumed that changing design specifications for schools will change the nature of education that is delivered in the classroom - and will do so in the ways desired by policy makers (Darling-Hammond, 1993). This belief in a relatively direct relationship between federal policy inputs, local responses and program outputs (McLaughlin, 1990), translated into the adoption of "world class" standards that required more subjects, a longer school year, more homework, and an obsession with higher test scores. However, scant attention was paid to the primacy of the teacher in the classroom. "Teachers were expected to change their behavior, knowledge and actions as a result of a change process that consists primarily of the issuance of a statement and the adoption of new regulations or curriculum packages" (Darling-Hammond, 1993, p. 756).

The problem created by the first wave of school reform was that in practice the mandates handed down by state authorities to local districts and classroom teachers

legitimized the relentless drive for standardization of both classroom organization and instructional strategies. Education as it was being redefined by contemporary school reform presented several dangers: overstandardization, oversimplification, overreliance on statistics, student boredom, increased dropouts, a sacrifice of personal understanding, and, probably, a diminution of the diversity of intellect among people (Stake, 1991). By mandating educational outcomes through standardized tests, content through curriculum alignment, and teaching methods through teacher evaluation criteria, states set in motion a chain of events that altered educational ends and means (Wise, 1988). In this conceptualization of the teaching-learning process, standardized tests set educational objectives for teachers, while at the same time curriculum alignment ensured that teachers covered the material to be tested. The clamor for higher standards during this first wave of school reform was another example of education policy in which the ends of education overshadowed the means, instead of simply informing them. The primacy of standardization over student-centered learning in these state mandates ultimately resulted in both curriculum and instruction being reduced to little more than that which could be measured through standardized tests (Meek, 1991; Darling-Hammond, 1990, 1993; Lieberman, 1991; Shepard, 1991; Stake, 1991).

Another underlying assumption of this first wave of school reform was the presumed linkage between international and interstate economic competition and education (Kirst, 1990). Just as policymakers at the turn of the nineteenth-century had to contend with massive waves of unskilled and undereducated immigrants to this country, so did the proponents of the first wave of school reform. During the late 1800's growing economic competition with Germany and England convinced business leaders that

schools needed to produce skilled workers in order to advance the country's international economic interests (Cuban, 1990b). This same sentiment was echoed by those policymakers calling for higher standards in the 1980's who saw the global economic preeminence of the United States being threatened by competitors from Asia, as well as Europe. An educated workforce was considered critical to higher productivity and adaptability to rapidly changing global markets. Corporate leaders and public officials who saw public schools as engines of national economic progress, were faced with what they considered to be a generation of inadequately trained graduates. When students with limited exposure to new technologies entered the computerized workplace, it became apparent that schools were producing graduates armed with insufficient knowledge, inadequate basic skills, and poor work habits (Cuban, 1990a, 1990b; Darling-Hammond, 1993; Kirst, 1990; Maeroff, 1988).

Despite the presumed linkage between schools and economic productivity, dissatisfaction with the outcomes of the excellence movement began to surface. After the implementation phase of these reforms was well under way, a growing feeling developed among skeptics that the new standards were not achieving the desired world-class results. Despite trends toward significantly changed course taking patterns which placed a greater emphasis on math and science, and upward movement of state achievement test scores, "... no body of evidence demonstrates to the satisfaction of anyone--except true believers--that the last decade of curricular additions have made America's economy more productive or more competitive" (Cuban, 1993, p. 183).

On the contrary, the insistent drive toward increased standardization of both testing and curricula compelled teachers to emphasize the so-called basics, the most

elementary and functional level of both knowledge and skills. De-emphasized was development of higher order cognitive abilities, deeper understanding of subject matter and relevancy, or the linkage of the outside lives of students to their school lives. Instead of producing thoughtful, creative, and adaptable workers for industry, according to Bastian (as cited in Apple, 1990) schools were in danger of "...polarizing the workforce into a small professional strata and a large pool of low-waged, de-skilled service and production workers indicating our increasingly bureaucratized and industrialized education will mean more for a few and less for many" (p.162). The intrinsic value of schools as public spheres devoted to teaching students the knowledge and skills needed to collaborate and function successfully in a democracy was de-emphasized in the first wave of school reform. Rather, emphasis was placed on the instrumental value of schools and their ability to reproduce the values, social practices, and skills needed by the dominant corporate order (Giroux, 1997, p.119).

Although national goals, standards, and tests remained as core issues during the first wave of school reform, interest began to grow in the question of educational equity. Historically, public schools had served as sorters which functioned to determine who would go on to college to acquire the skills and abilities thought necessary to control the means and resources of the economy and who would directly enter the workforce and be manipulated by their peers with a superior education (Anyon, 1980; Apple, 1971; Mickelson, 1980; Giroux, 1983; Freire, 1970). However, the paradigm of education as "sorting machine" began to shift during this phase of the excellence movement. Rather than sorting some students into challenging academic tracks and others into less demanding vocational tracks, public education was expected to succeed with *all* students.



As never before, schools became more inclusive communities and were forced to deal with issues of disability, race, class, and gender. This expectation of educational equity for all students provided an enormous shock to the public schools of America.

Commenting on these shifting expectations, Negroni (1994) argued "the responsibility for the learning of students has been shifted to the school rather than resting on the students themselves. This is an important, if not critical, shift in perspective" (p.20). This new demand for educational equity challenged schools to reexamine the effectiveness of the new standards to increase the academic achievement of an increasingly heterogeneous student population.

This new focus on educational equity developed at the same time that the demographics of the United States were undergoing rapid change. Immigrants in large numbers had arrived from countries that did not share languages or cultures commonly associated with the mainstream population of the United States. This flood of immigration had radically altered the socio-cultural milieu of American schools and brought forth demands for increased multicultural sensitivity on the part of public schools. In addition, an increase in the proportion of students living in poverty attending public schools had also created an urgent need for models of education that fostered excellence for all students. Summing up the new societal expectations faced by public education, Negroni (1994) cautioned, "Combine these new demographics, higher expectations for all, an alarming increase in poverty, an increasingly technologically complex society, as well as a stagnant economy, and this country faces a problematic historical moment for its public schools" (p.20).

During this first wave of school reform the field of special education began to question its educational policies and practices promulgated under Public Law 94-142, the Education for All Handicapped Children Act (EHCA) of 1975. The intent of this law was to ensure that all children, disabled or not, had access to a free and appropriate public education. However, dissatisfaction arose with the educational as well as social outcomes of exceptional, or special education students, who had been receiving these newly guaranteed services (Carlberg & Kavale, 1980; Edgar, 1987; Kavale & Glass, 1982; Texas Education Agency, 1991). A reexamination of the dual delivery system of general and special education was provoked by the Regular Education Initiative (REI), a reform proposed by Reynolds and Wang (1983). An underlying assumption of the REI was the failure of the EHCA "pull out" approach to delivering educational services to exceptional students. It was argued that the mainstreaming of exceptional students into regular education classes had created a dual system of education which was in fact "separate but not equal" (Lipsky & Gartner, 1989; Reynolds, Wang & Walberg, 1987; Skrtic, 1991; Stainback & Stainback, 1992; Stainback, Stainback & Forest, 1989; Will, 1986).

According to REI advocates, the solution to the problem of educational equity was to eliminate most mild to moderate disability classifications and to include these students, as well as those served under Chapter 1, bilingual education and migrant education into a restructured, unitary system of regular education (Ware, 1994, p.4). The REI had the strong support of Madeline Will, the Assistant Secretary for the Office of Special Education and Rehabilitative Services (OSERS) in the Reagan administration. According to Will (1986), "This pull-out approach to the educational difficulties of

students with learning problems has failed in many instances to meet their educational needs and has created, however unwittingly, barriers to their successful education" (p.412). The REI debate gradually evolved into an even more radical argument for a unitary system of public education--inclusive education. Proponents of inclusive education argued it would provide all students, even those with severe and profound disabilities, with equal access to a quality education that was rigorous in standards as well as encompassing in scope. In either case, integrating most or all students with special educational needs into a unitary system of public education would require a radical, systemic, and coherent transformation of schooling as we had come to know it in the twentieth-century (Follet-Lusi, 1994; Sailor, 1991; Skrtic, 1991; Thousand & Villa, 1991).

Although many reports on the state of American education such as, A Nation at Risk, High School (Boyer, 1983), A Place Called School (Goodlad, 1984), and Horace's Compromise (Sizer, 1984) issued during this first wave of school reform discussed the challenges faced by regular education, they were ominously silent on the relationship of special education to the quest for academic excellence. While one can hardly argue with the goals of excellence presented in these national reports, little mention was made of what would happen to those youngsters who were unable to meet these new standards (Sapon-Shevin, 1987). Furthermore, scant reference was made in these reports as to what form the interface between special and regular education should take if the issues of equity and excellence were to truly be addressed. Failure to clarify this structural issue had the potential of having special education being, at the least, bypassed by the quest for

excellence movement and, at the worst, having whatever tenuous progress it had made up to that date destroyed (Lilly, 1987; Pugach & Sapon-Shiva, 1987; Sapon-Shiva, 1987).

By the end of the first wave of reform, critics in both special and regular education warned that attempts to achieve world-class standards for all students without changing the traditional organizational and instructional context within which student learning occurred, would result in opposite educational outcomes taking place (Cuban, 1983; 1993; Darling-Hammond, 1990; Stake, 1991; Skrtic, 1991). It was feared that students under mandate to achieve even higher standards than those which had previously resulted in academic frustration and failure, would drop out of school in increasingly greater numbers. Concern was also voiced that teachers, already ill at ease with hard to reach children, might become less and less able to respond to the range of individual differences in their classrooms. Commenting on the lack of references to special education in the major reform reports of the 1980's, Shepard (1987) warned, "In a sense, regular and special educators have colluded to relieve regular teachers of responsibilities for teaching children functioning at the bottom of their class. If a child is handicapped, regular teachers are absolved from responsibility" (p. 328). It seemed as if educational reform had once again come full circle - establishing ends without the means to achieve them.

### The Second Wave

Debate over the deficiencies of the first wave of school reform resulted in a shift of paradigm, bringing forth yet another wave. This second wave of reform emphasized

the need to improve education by decentralizing and professionalizing teaching, and by investing in the knowledge and skills of educators rather than in prescriptions for uniform practice (Darling-Hammond, 1993). By the late 1980's and early 1990's reformers focused less attention on state mandates designed to increase teacher and school accountability. Rather, attention was directed toward the creation of decentralized decision-making structures, such as site-based management (SBM) and shared decision-making (SDM). According to a report issued by the Carnegie Forum on Education and the Economy (1986), a fundamental redesign and restructuring of the teaching force and schools was needed in order "...to provide a professional environment for teaching, freeing teachers to decide how best to meet state and local goals for children but holding them accountable for student progress" (p.26).

Restructuring in the field of special education was stimulated by the reauthorization of the EHCA in 1990. The passage of Public Law 101-476, which retitled the EHCA as the Individuals with Disabilities Act of 1990 (IDEA), and its subsequent reauthorization as the IDEA Amendments of 1997 (PL 105-17), began to address the issue of how to include exceptional students in the second wave reforms. According to Yell and Shriner (1997) "These amendments were seen as the next step in providing special education and related services by ensuring that students with disabilities would receive a quality public education.... By ensuring access to the general education curriculum and reforms" (p.1).

Educational reformers argued that meaningful change would not be accomplished by official prescription of standards. Faced with a growing diversity of student culture and educational needs, standards were increasingly viewed as only a part of the complex

educational puzzle. Rather, increased student achievement would result from a change in our ability to understand teaching and learning in the contexts in which they occur. Thus, human enterprise and vision, guided and mediated by the dynamics and tensions of the classroom, challenged the traditional bureaucratic means to reform.

### Statement of the Problem

Historically, considerable emphasis in educational research has been placed on developing a systemic and rigorous body of knowledge about teaching in which little attention has been given to the roles teachers might play in generating such a knowledge base (Cochran-Smith & Lytle, 1990). The critical role that teachers play in this generative process, that of theorizing about the meaning-making processes that shape life in the classroom, taking actions to improve this life, and ultimately reflecting upon the results of such actions, has been largely ignored in favor of technical innovation and organizational procedure. Underlying this rational-technical approach to research are the dual assumptions that: 1) Teaching is a linear activity in which poor student outcomes can be attributed to the poor quality of school workers and the inadequacy of their tools, and 2) These problems are subject to revision through mandated, top-down prescriptions (Meek, 1991; Murphy, 1990). In this conception of educational research, little emphasis was placed on the myriad contexts in which teaching and learning actually took place.

As criticism of the effects of early school reform efforts began to increase (Adler, 1982, 1984; Goodlad, 1984; Kozol, 1991; Sizer, 1984), greater emphasis was placed on capitalizing on the creativity and expertise of individuals at the school level. A shift of

paradigm occurred in which the linear, rational-technical viewpoint of education, with its emphasis on innovation, gave way to a complex, non-rational-cultural point of view.

This new educational paradigm emphasized context over innovation. It ushered in an era in which the locus of energy propelling educational change shifted from externally driven mandates to internally motivated professionalism.

Traditionally, educational change was an externally driven process, which relied on the bureaucratic model to institute improvement proposals. Underlying this change process is the assumption that schools may be characterized as responsive organizations. When faced with the need to change educational practices, whether due to external or internal forces, schools have historically responded by intensifying already existing structures and procedures (Fullan, 1991). This process focused on the willingness of teachers to unhesitatingly change their practices in an unreflective manner. Ravitch (1985, p.19) asserted, "Educational reform movements have taken teachers for granted and treated them as classroom furniture rather than as thinking and possibly disputatious human beings. "This rational-technical approach to change had minimized the opportunity of teachers to meaningfully reflect upon educational practices in the context of their respective classrooms. This view was echoed in a report issued by the Education Commission of the States (1986) which stated:

Nobody reports to the teacher. The teacher reports to everyone else. Other people decide almost everything--how the day is organized, how the students are assigned, what the curriculum should be, what is the day-to-day scope and sequence of instruction, how discipline is meted out. The school operates in an incredible, bureaucratic culture, at the bottom of which we find the teacher (p.22).

Given its focus on the context of teaching and learning, the nonrational-cultural approach to educational change generated substantially different questions for educational researchers to ponder. Previous educational change research focused on technical innovation rather than contextual issues. The rational-technical approach to change placed little emphasis on dialogue and personal reflection for understanding, opting instead for bureaucratically imposed prescriptions. According to Marris (1975):

When those who have the power to manipulate changes act as if they have only to explain, and when their explanations are not at once accepted, shrug off opposition as ignorance or prejudice, they express a profound contempt for the meaning of lives other than their own. For the reformers have already assimilated these changes for their purposes, and worked out a reformulation which makes sense to them, perhaps through months or years of analysis or debate. If they deny others the chance to do the same, they treat them as puppets dangling by the threads of their own conceptions (p.166).

Gradually, as teachers came to be recognized as individuals possessing both a point of view and a capacity to reflect upon practice, educational change research refocused and began to look upon teaching and learning through a different lens. Of utmost importance were questions concerning the beliefs and assumptions that shape the actions of teachers (Gitlin, 1990; Jackson, 1986, Lortie, 1975) and the context in which these actions took place. This approach to educational change research evolved, changing its focus from the study of routine teacher behaviors, to one of teachers as active decision-makers, working in complex environments. What has emerged from this more recent line of research is a view of teaching, not as a set of routine behaviors that can be scripted and implemented uniformly in classrooms. Rather, teaching is viewed as a non-routine technology that relies upon teacher judgement and expertise for its success



(Rowan, 1995). This type of research is grounded in practice at the classroom level. It focuses on teachers "who reflect upon their practice to strengthen and develop its positive features. They are not prepared to blindly accept the problems they face from day to day, but instead they reflect upon them and search for solutions and improvements"

(Altrichter, Posch & Somekh, 1995, p.5). From this point of view the traditional approach to educational change research is seen as inadequate as it does not provide the narratives, or the motives, that might explain the success, or failure, of reform initiatives.

Fullan (1991) cautioned:

The problem of meaning is central to making sense of educational change. Neglect of the phenomenology of change - that is, how people actually experience change as distinct from how it might have been intended--is at the heart of the spectacular lack of success of most social reforms (p.4)

The non-rational cultural perspective on educational change presumes that meaningful change in schools is cultural change. The culture of the school, or the context in which teaching and learning takes place, has a powerful effect on instructional practice. According to Ott (1989) "The personal preferences of organizational members are not restrained by systems of formal rules, authority, and norms of rational behavior. Instead they are controlled by cultural norms, values, beliefs and assumptions" (p.3). Furthermore, according to Rabinow (1977),"culture is interpretation." Therefore, as schools struggle to reform and restructure so that they may meet the needs of *all* students, an understanding of how teachers interpret their practices in context, and how the culture of the school influences, constrains, or encourages these practices become critical aspects of school success, or failure.

## Purpose and Scope of the Study

The purpose of this study was to describe and explain the perspectives on inclusion of four middle school teachers. Given this purpose, the exploratory questions that guided the study were: 1) What elements constituted these teachers' perspectives on inclusion? and 2) What variables had an impact on these perspectives? To address these questions of perspective and impact, I attempted to describe and explain (a) the nature and effects of teachers' interpretations of practices that influenced inclusion; (b) the nature and effects of teachers' interpretations of themselves as professionals; (c) the effects the organizational culture of schooling had on these interpretations; and (d) the ways in which the organizational culture of schooling and the teachers' interpretations of self and practice impacted on their ability to implement the successful inclusion of all students. The study initially focused on four middle school teachers, two regular educators and two exceptional educators. Due to the evolutionary and reconstructive nature of qualitative research, this initial group changed, and other significant participants were added as the study progressed. These additional participants included three exceptional educators and a District coordinator. The study described these teachers' perspectives as they attempted to successfully integrate exceptional students into the schools regular curriculum during the 1998-1999 school year.

I spent a semester in and around this group of teachers as they employed various instructional innovations and grouping procedures with these exceptional students. Extensive observations of classroom teaching occurred. These observations were followed up by intensive interviews focused on the way teachers made sense of their

educational practices. In addition, school documents were analyzed in an attempt to determine what effect the culture of the school had on the ability of this team to successfully include exceptional students in the regular curriculum.

## CHAPTER II

### REVIEW OF RELATED LITERATURE

Memories are not history. They are fragments of things and feelings that were tinted and sifted through varying prisms of present time and disposition.

Yoel Dayan, 1985

The review of related literature will be presented in two sections. The first section reviews the literature on the implementation and history of planned educational change. The discussion first focuses on how context and voice impact upon the process of school reform. A historical synopsis of the major reform efforts of this century will follow. The second section of this review discusses the influence that planned educational change has had upon special education. Focus will be placed on the nature of the interface between regular and special education brought about by planned educational change, as well as the points of conflict and tension that such a linkage has fostered. Together, these sections will inform the reader of the critical issues impacting upon the nature and implementation of school reform and restructuring. In addition, this discussion of issues and perspectives will serve as a starting point for the emergent theoretical framework of this dissertation.

## The Implementation of Educational Change

The implementation of change in the public schools of the United States has long been a topic of intense and recurring interest to both the public and educators alike. This enduring debate has created points of conflict as well as tension, and has been characterized by an overriding concern that American education has been in a state of decline; that its goals and achievements have been out of touch with the wants and needs of society. This sentiment has been echoed in numerous national reports on the state of American public schooling. Foremost among these reports was A Nation at Risk which harshly warned, "The educational foundations of our society are presently being eroded by a rising tide of mediocrity that threatens our very future as a nation" (National Commission on Excellence in Education, 1983). This influential report sadly noted, "For the first time in the history of our country, the educational skills of one generation will not surpass, will not equal, will not even approach those of their parents." It seemed as if interminable decades of school reform had brought us no closer to achieving the oft-stated, but extremely illusive goal of providing a quality education to all students.

Public education in the United States has an extensive history of reform attempts; most of them rooted in a desire to improve not only schools themselves, but also society as a whole. Contemporary school reformers have long viewed education as a powerful device for achieving social change. According to Darling-Hammond (1997):

Public education is central to the promise of American democracy.... It provides a vehicle for all citizens, regardless of wealth or circumstances of birth, to aspire to all the rights and benefits of society and to create a community with shared purpose (pp.41-42).

## Early Reform Attempts

From the American Revolution onward, educational theorists have self-consciously used schooling to construct the citizens of a new order (Tyack & Cuban, 1995). Fueled by a growing spirit of nationalism, schools of eighteenth century America were called upon to actively form a national character (Tyack, 1967). During the colonial era, public education was viewed as the one sure means capable of creating a homogenous American culture. As such, schools were viewed as agencies of social reform; public spheres that would instill standards of morality, as well as reinforce the legitimacy of established authority. Ever increasing immigration in nineteenth century America brought about the drive for common schools. Conservative support for the common school saw education as a peacekeeping agency, "...a wise and liberal system of police, by which property and life, and the peace of society are secured, thereby purifying the whole moral atmosphere" (Beard & Beard, 1935). Once more schools were called upon to play the role of active socializing agents; bastions of authority that would guarantee social stability, this time in the face of a growing and increasingly diverse population. The Industrial Revolution of the late nineteenth century brought about a need for schools to stress "...punctuality, regularity, and silence; as habits necessary through life for success in an industrial society (Tyack, 1967). Standardization of organization and the imposition of values and habits thought necessary to be a successful worker were the hallmarks of educational reformers of that era. Increased industrialization had created not only a demand for obedient and reliable students, but for technically skilled workers as well. Fueled by a burgeoning economy, demands grew for such educated workers as

they were thought to be a crucial factor for the continued growth and survival of the American economic system. This demand for skilled workers brought about yet another reform in American education, the creation of the comprehensive secondary school. As long as schooling was seen as useful primarily to create and develop social harmony, and secondarily as a means to better individual advancement, then education beyond basic schooling was deemed unnecessary. However, with the rise of urban America and the growth of industry, it became apparent that elementary schools of the time were not fully equipped to prepare students for the new economic and social realities of the era. According to McMannon (1997), "Knowledge, like work, became more specialized, and the traditional institutions less able to educate the young thoroughly" (p.2). While the explicit social control functions of the elementary schools had been successful in instilling a culturally accepted and homogenous set of values and beliefs in students, graduates increasingly lacked the technical skills needed by a rapidly expanding American economy. This lack of employment skills on the part of young students necessitated that any specialized or skilled training needed by industry would have to be provided by an institution other than the elementary school (Vallance, 1974). Thus, an underlying rationale for a truly comprehensive high school, that of providing a skilled workforce for American industry, began to emerge.

### Rising Expectations

This brief history of pre-twentieth century school reform serves to highlight the notion that for over a century and a half, Americans have translated their cultural

anxieties and hopes into dramatic demands for educational reform (Popkewitz, 1988). Faith in the power of education has had both positive and negative consequences for the public schools of the United States. It has helped to persuade citizens to create the most comprehensive system of public schooling in the world (Carnoy & Levin, 1976; Tyack & Cuban, 1995). The system of public education expanded historically, so that by the middle of the twentieth century a substantial majority of Americans were completing secondary school, and virtually all entrants to the labor force had an education that included at least some high school. Physically, schools of the mid-twentieth century were very different places than schools in 1900. Rather than being simple, utilitarian structures they contained libraries, lunchrooms, space for health clinics, industrial and manual training shops and playgrounds. The expansion of schooling to embrace all groups of children regardless of background throughout the nineteenth and twentieth centuries has been a trend-line of almost revolutionary proportions that marks the United States as unique in the family of nations (Cuban, 1990a).

However, this faith in the power of education to solve societal problems has often led to disillusionment and to blaming schools for not solving problems that realistically, may be beyond their reach (Paris, 1995; Tyack & Cuban, 1995). Historically, once a social problem had been identified and labeled, schools had often been charged with the development and implementation of an educational solution. Addiction fueled alcohol and drug instruction, AIDS promoted sex education, home economics was utilized to lower the divorce rate, and vocational training and computer literacy were hailed as weapons in the fight to keep the United States economically competitive. When President Lyndon B. Johnson sought to solve the pressing national issues of poverty and



discrimination by building a Great Society, he asserted that, "The answer to all our national problems comes down to a single word: education" (as cited in Perkinson, 1991). Indeed, government policies initiated during the 1950's, 60's and 70's insured that education would support and expand the democratic promise and expectations of life in America - the possibility of decent, secure, and fulfilled lives. Education provided a lever to groups struggling to gain from government the resources and assistance that might enable their children to overcome the disadvantages that had occurred because of wealth, race, gender, and mental or physical handicaps (Aronowitz & Giroux, 1985, 1993; Berube, 1994; Purpel & Shapiro, 1995). In particular, the expansion of special education services represented a bold governmental effort to overcome the social, cultural, and economic inequities that had previously prevented many exceptional students from sharing in an equally rewarding educational experience as their non-exceptional peers.

This penchant for solving the problems facing society through schooling has often diverted attention from more costly, politically controversial, and difficult societal reforms (Aronowitz & Giroux, 1993; Tyack & Cuban, 1995). Just as the everyday lives of teachers cannot be separated from the culture that exists within individual schools, neither can schools separate themselves from the larger culture within which they exist. During the 1950's, 60's and 70's, much of the discourse on public education focused on its ability, real or imagined, to ameliorate serious social problems such as poverty, unemployment, crime, discrimination and racism.

## Equality and Education

Beginning in the 1950's with the classic school desegregation case Brown v. Topeka Board of Education (1954), American courts reaffirmed the right of a wide range of minority groups including exceptional students, to have access to an education that was equal to that of the majority of public school students. Although the Supreme Court in Brown had set the process of equality in motion, it failed to set a deadline by which educational equity should take place. Rather, the court had entrusted desegregation efforts to localities, a decision that delayed school integration of both minorities and exceptional students for at least a decade in many places. As a consequence of this court decision research reports showing the positive benefits of school integration were eagerly received by civil rights leaders who wanted to prove their case (Berube, 1994, p.58).

The most important of these reports was the U.S. Office of Education's massive study, Equality of Education (Coleman, et al., 1966). This report, more commonly referred to as the Coleman Report, concluded that family background was the most salient of all the quantitative variables it had examined. In short, what the child brought to school, not what impact the school had on the child, was perceived as the most important variable in the quest for school excellence. At the same time, the Black struggle for equality fueled demands for educational change during the 1960's and 70's. The Civil Rights movement fostered the creation of a national agenda for school reform that focused on the twin issues of discrimination and poverty. This educational agenda was set in motion by President Lyndon B. Johnson and resulted in two important initiatives. The first was 1965's Elementary and Secondary Education Act, an initiative

that funded innovative programs for the poor. The second was the Head Start program, an initiative designed improve the chances of school success of poor pre-school age children. The call for equity dominated discussions regarding American education for three decades until the excellence movement of the 1980's changed the nature of educational discourse. The demands for educational equity for poor, as well as for exceptional students, diminished as the Civil Rights movement which had largely created such an outcry, also faded out of the national consciousness. America of the 1980's was not overly concerned with equal opportunity for all. Rather, it concerned itself with halting what was perceived to be a precipitous decline of the American economy in the emerging global marketplace.

During the 1980's educational discourse took on a different tone. The reform movement of that era sought to concentrate efforts on the other end of the socio-economic spectrum, the best and the brightest, in order to compete economically in the global marketplace (Berube, 1994; Toch, 1991). Most of the national reform reports of the 1980's focused exclusively on issues of excellence, on higher standards and test scores, on longer days and years, on additional courses and requirements. The language and logic of industrial life increasingly dominated public discussion of education during this first wave of school reform. Concerns were framed in terms of output, performance, and productivity (Giroux, 1997; Purpel & Shapiro, 1995). The issue of how such technical innovations might affect the tenuous educational gains made by poor, as well as exceptional students during the previous two decades was dwarfed by the larger issue of how to prepare competent employees for the troubled American workforce.

## Durability of Core Practices

Scant attention was paid to changing the core practices of schools as a means to not only increase student achievement, but to foster educational equity as well. Such core practices, or how teachers understand the nature of knowledge and the student's role in learning, and how these ideas about knowledge and learning are manifested in teaching and classwork, were ignored in favor of technical innovation (Elmore, 1996a; Newman & Wehlage, 1995). Much of the jargon of the time concerned itself with policy mechanisms such as prescriptions, tightly specified resource allocations, and performance measurements that focused primarily on repairing faulty components of the existing system (Murphy, 1990). Such innovations, while worthwhile practices in their own right, did not help to alleviate the fundamental problems that faced education. Nor did they assist schools in addressing the larger societal issues of educational equity and increased student diversity with which public education was grappling. In terms of special education, exceptional students access to a challenging and rigorous curriculum was not addressed merely by the raising of standards, or the lengthening of the school year. Many critics (Chubb, 1988; Cuban, 1984a; Sizer, 1984; Sarason, 1990) argued that fundamental revisions were needed in the cultural institutions of the larger society in order for schools to be truly effective and equitable. Change was needed in the ways that educational systems were organized and governed, in the roles adults played in schools, and in the processes used to educate America's youth (Murphy, 1990). Commenting on the shallow nature of educational discourse, Purpel and Shapiro (1995) argued:

We find in these discourses an obsession with preserving American economic and military might and with servicing a postindustrial economy that has failed to respond adequately to the needs of developing a fair, just and democratic society.... Our basic criticism of the professional discourse is that it seeks to avoid political, moral, and social issues, preferring the safer, less controversial realm of technical problems; in so doing the profession becomes the agent of those who shape the larger social and cultural agenda. (p.4)

Much of what passes for change in American schools is not really about changing core practices. The technical innovations of the first wave of school reform were not explicitly connected to fundamental changes in the way knowledge is constructed. Nor were they connected to the division of responsibility between teacher and student, the way students and teachers interacted with each other around knowledge, or any of a variety of other stable conditions in the core. Although schools seem to be in a constant state of change, basic conceptions of knowledge, of the teacher's and student's role in constructing knowledge, and of the role of classroom and school level structures in enabling student learning remain relatively static (Elmore, 1996b). In a similar vein, Tyack and Cuban (1995) argued that the basic grammar, or the predictable ways in which schools have come to be structured and organized, has remained remarkably stable over the decades. Established institutional forms came to be understood by educators, students, and the public as necessary features of a "real school." They became fixed in place by everyday customs and legal mandates until they were hardly noticed. These structures and norms became just the way schools are (Metz, 1990). Change agents attempting to reform this familiar grammar of schooling inevitably found it to be quite durable and resistant to transformation. According to Tyack and Cuban (1995), "When new departures survived more or less intact, they typically took hold on the periphery of

the system in specialized niches; industrial education, continuation schools, or special education for gifted or handicapped students" (p.87). Rarely have the expected features of schooling, such as the manner in which students are classified and organized or the way in which knowledge is divided into discrete subjects, been altered by school reform. Rather than affecting practices that are close to the core of schooling, departures such as special education remained apart and separate. They were relegated to the outer fringes of education, affecting a small minority of students while the familiar grammar of schools remained just as it had been for decades.

The lacks of change in core practices as well as the durability of the established grammar of schooling have both had serious implications for special education. The passage of P.L. 94-142 in 1975 was a further attempt by government to address the issue of educational equity for exceptional students by guaranteeing them access to a free and appropriate public education in the least restrictive environment - the regular education classroom. However, the long tradition of excluding exceptional students from regular classes has made their inclusion into the mainstream of school life an extremely difficult goal to reach. Including exceptional students into regular education classrooms requires a change in beliefs on the part of both educators and the public alike as to how a real school should be organized and how students should be grouped for instruction. According to Stainback (Stainback and Bunch 1989), regular education teachers perceive special educators as having both special training and a special capacity for their work. These regular educators consider themselves a breed apart and deem working with exceptional students as inappropriate. In addition, most Americans have been to school and believe their formal education has made them experts on how schools should be

structured. If reform, in this case including exceptional students in regular education classes, is not in congruence with the cultural template that has helped maintain the legitimacy of schools in the mind of the public, its' acceptance by all stakeholders involved may be in doubt. Whether the public can shift perceptions of how a school is structured, so that exceptional students being included in regular classrooms fits their notion of a real school, is not at all certain. However, we as educators, "...must perform work in the faith it is possible and, moreover, that it is imperative to participate in the process of determining the nature of such changes" (Purpel & Shapiro, 1995, p.18). In this manner, teachers may become active agents of change. Such a role would help them in the process of shaping the larger social agenda, rather than passively accepting an agenda whose visions and goals have been shaped by others (Ayers, 1992). This shaping of public perception and understanding will help determine precisely what issues will, and will not, be on the reform agenda. By influencing tradition-bound colleagues, as well as the public alike, teachers may enhance the notion of exceptional students in regular classes as being a feature of a "real school."

### Cycles of Change

This historical discussion also serves to emphasize the cyclical nature of educational change. Reform visions often depend on a view of the past as a series of failures that killed a golden age of schooling. Critics' claims about what happened in schools in earlier decades and policymakers assumptions about the past often became rationales for reform (Cuban, 1990a, p.3). An understanding of why these reforms failed

in the past and why they seem to return again and again is of utmost importance for today's policymakers, as these recurring questions go right to the heart of current reform debates. For example, the need for improved career education, a prominent issue in the first wave of school reform during the 1980's, as well as the current "School-to-Work" initiative of the 1990's, was first called for in 1911 by the Committee of Nine on the Articulation of High School and College. In a report issued for the National Education Association (NEA), the Committee of Nine argued the purpose of high school "was to lay the foundations of good citizenship and to help in the wise choice of a vocation" (Goodlad & McMannon, 1997, p.8). Likewise, the criticisms of current school reformers - that American schools provide an education that is too rigid, too passive, and too rote-oriented to produce learners that can think critically, that can synthesize information and create new ideas - are identical to those of the Progressives at the turn of the century, in the 1930's and again in the 1960's (Darling-Hammond, 1993). Disappointment with the outcomes of these previous reform attempts led in each instance to renewed calls for yet more reform and restructuring. It would seem that school reforms have a habit of appearing over and over again, not exactly as before or under the same conditions, but they persist. The return of school reforms suggests that such efforts had failed to remove the problems they were intended to solve (Cuban, 1990a). The current controversy regarding the inclusion of exceptional students in the regular classroom serves to highlight the fact that past reform efforts toward achieving this goal have not yet produced the desired effect. The passage of PL 94-142 during the 1970's with its call for educational equity and the demands of excellence called for during the 1980's have not completely achieved the goal of granting to exceptional students, an



education equal to that of their regular education peers. It would seem that further efforts, perhaps the increased inclusion of exceptional students into regular classrooms, will be needed to finally achieve the calls for equality first called for by the courts in 1954.

### Incoherence of Reform Policy

The recurrent nature of school reform has alternately fueled charges that schools on the one hand are resistant to change and on the other hand are too faddish and prone to adopt innovations in an unreflective manner. In an attempt to satisfy the demands of a large and often divided constituency, schools have often adopted innovations whose goals are disconnected, or worst yet, at odds with each other. The current policy regime, exemplified by the state-level reforms of the 1980's has been characterized by a disconnected, piecemeal approach to education reform (Cohen & Spillane, 1992; Smith & O'Day, 1991). Existing policies in one area of education frequently undermine the efforts at improvement being taken in other areas. For example, when states increased graduation requirements in the 1980's with the goal of increasing student achievement, little attention was paid to the fact that a suitable curriculum did not exist to achieve such a goal. Nor was thought given to the fact that many teachers lacked the prerequisite knowledge and skills needed to teach it (Clune with White & Patterson, 1989).

This incoherence in reform policy is further complicated by the fact that increased policymaking activity at all levels of government has resulted in their sending schools signals that have become increasingly dissonant and uncoordinated. According to

researchers (Cohen, 1982; Fuhman, Elmore & Massell, 1993) each new policy initiative, whether from the federal, state, or local level, is added to the previous ones, and none are taken away. Schools themselves are expected to resolve these competing expectations of various generations of reform. Many school districts have responded to this incoherent policy environment by transferring the incoherence of policy into their daily operations (Furhman, Elmore & Massell, 1993; Furhman, 1994; Massel, 1994). New curriculum standards become layered over the top of existing ones creating a mix of strategies that may make little sense in the classroom. New tests create demands for teachers to "teach to the test," whether or not such tests actually really reflect what students ought or need to know. In-service courses are given to teachers so that they may meet the demands of each new policy directive without any thought being given to how such new knowledge connects to current practice.

The reforms of the 1970's and 80's have increased public focus on issues of academic equity and excellence. They have also created the expectation that all schools will teach academic content at a high level of understanding to all students. However, such reforms "...have done little to decrease the conflicting policy demands that operate on schools and have contributed to an increasing incoherence in the policy environments of schools" (Furhman, Elmore & Massell, 1993, p.8). The incoherence of policy demands has had important implications for special, as well as regular education. This is especially true in light of the many, changing demands put on educators by the 1997 Amendments to the IDEA. While exceptional students are increasingly benefiting from the vision of equality begun in 1975 by PL 94-142 and are finally being included in regular education classrooms, this inclusionary process has created a great deal of tension

and anxiety in schools. Students accessibility to a more rigorous curriculum, their ability to successfully meet the challenges imposed by higher standards found in such classrooms and the lack of teacher preparation necessary for successful inclusion have become critical issues for current educational reformers.

### The Intractable Nature of Schools

Implementation of these myriad innovations has often been complicated by the fact that schools must continue their task even as they consider the impact of change. There has been a tremendous temptation to simply rename, rather than change existing patterns and practices in order to satisfy the widespread demands for reform. According to Paris (1995) "...too often instead of changing to fit the reforms, schools made the reforms conform to the way schools had always been" (p.206). For example, recent calls for restructuring have resulted in various forms of shared decision making forums in individual schools. These forums had been envisioned as means to create communities of learners, with all members contributing towards the common goal of school improvement (Fullan, 1991, 1993; Sergiovanni, 1992, 1996). However, no matter what the name-- shared decision making or school based management - the fact remains that schools continue to be governed in a traditional top-down, bureaucratic style. While teachers have increased input into decisions affecting school governance and curriculum, most important decisions continue to be made by administrators and principals. It would seem that the mere renaming of school governance does not alter the way in which schools are actually organized. Nor does it change the hierarchical relationships of power among the

key players in the governance of schools. Teachers remain at the bottom of such a pyramidal structure, supervised and evaluated by assistant principals who in turn answer to "the boss" - the principal. To use an old cliché, it is something like trying to change horses in the middle of the stream. While the industrial model upon which schools have gone to great lengths to emulate has changed dramatically from top-down and rigid to collaborative and flexible, schools remained mired in the bureaucratic structures dominant at the turn of the century.

### Teachers React

Teachers have often reacted to calls for school reform with a sense of resignation and half-hearted acceptance. Tyack, Kirst and Hansot (1980) note that educators have often paid lip service to demands for reform to signify their alertness to the public will, but their symbolic responses often protected school personnel from basic challenges to their core practices. The everyday lives of teachers have been well documented by many researchers (Cuban, 1984a; Jackson, 1968; Kozol, 1991; Lortie, 1975). The picture is one of teachers possessing a short-term perspective that focuses on day to day events. Of teachers isolated from their colleagues in individual classrooms. Of teachers that are overwhelmed and exhausted from attending to large classrooms filled with a diverse and often disruptive student body. And of teachers that have little time to reflect on the meaning of their practice. Many of the abstractions and assumptions of proposed reforms make little sense in the frenzied worlds of teachers. According to Lortie (1975), " Many proposals for change strike them as frivolous - they do not address issues of boundedness,

psychic rewards, time scheduling, student disruption, interpersonal support, and so forth" (p.235). This sense of disconnection from the spirit of many reform efforts has resulted in teachers hesitant acceptance of them in public, coupled with a return to the security offered by well-worn practice once the classroom door is closed.

That teachers would react to reform efforts in such a manner may not be hard to understand in light of the tone of most of the national reports of the 1980's, which were implicitly or explicitly critical of the teaching profession. According to these reports, teachers had failed to produce the desired academic results desired by the American public (Maeroff, 1988). The focus of school failure was placed squarely on the shoulders of teachers. Unlike the reform efforts of 1950's, 60's and 70's which in part sought to increase academic performance by improving or compensating for the outside lives of students, reforms in the 1980's focused solely on technical issues such as deficiencies in teacher preparation and performance. According to the Education Commission for the States (1983) those who had gone into teaching were the least intelligent of their collegiate peers. Other reports such as The National Commission on Excellence (1983) and The Twentieth Century Fund (1983) asserted that excellence was largely a question of salary - if teachers were paid better, they would perform better. The Twentieth Century Fund went so far as to blame teachers unions for educational decline. Most reports dealt briefly with teacher training and only a few touched upon the conditions under which teachers had to work ( Boyer, 1983; Goodlad, 1984; Sizer, 1984). Much more emphasis was placed on the evaluation of teacher performance. In large part this was due to the fact that many of the reports did not appear to perceive teachers as a distinct group of professionals with special training needs, or with needs relating to their

work conditions that go beyond those of a technician working in an industrial plant (Kelly, 1985). Educational reform reports at that time assumed: 1) Students were raw material to be processed by schools according to specifications dictated by schedules, programs, courses, and exit tests, and 2) Since students were standardized, and educational treatments could be prescribed, that teachers needed little professional judgement or expertise (Giroux, 1988). This almost industrial conception of teaching resulted in the creation of packaged materials that could be delivered by "trained" teachers. Professional development consisted of little more than in-service training for teachers so that exact implementation of these "teacher proof" packages could be enhanced. Some reports spoke of improving the professional preparation of teachers. Tomorrows Teachers: A Report of the Holmes Group (Holmes Group, 1986) called for all teachers to complete four years of liberal arts education, followed by a fifth year in which teaching methods would be learned, while A Place Called School (Goodlad, 1984) recommended intensified training of teachers in teaching methods. However, most school reformers continued to believe that if education could be fixed by better regulations, then there was no need to produce better trained teachers (Darling-Hammond, 1993). The common thread that ran through all the arguments concerning school effectiveness was that teacher deficiency was largely responsible for not producing the desired effects in the classroom.

## Impact of Voice

What was missing from first wave reform reports was the notion of teacher's being active agents in the process of school change. Little attention was given to the roles teachers play in the introduction of educational innovations. According to research (Fullan, 1993; Randi & Corno, 1996) there is very little evidence demonstrating that innovations imposed on teachers from external sources improved teaching and learning. This more recent line of research on voice has argued that teacher's perspectives and explanations of their classroom behaviors are central to understanding the learning process. Such qualitative information is crucial to, but missing from, many calls for school reform (Randi & Corno, 1996). Similarly, Grant, Peterson, and Shojgreen-Downer (1996) have found that teachers have different definitions and understandings of reforms which are mediated by their differing conceptions of students, the subjects they taught, the texts they used, their teaching practices, their prior experiences and their work setting. These studies seem to indicate that the "one size fits all" (Metz, 1988) approach to school reform, prevalent during the first wave, did not really work because it ignored the dynamics of both the school and classroom and took little account of teacher's knowledge and perceptions of such reforms. In fact, Semel, Cookson and Sadovnik (1992) concluded "...the standardization of teaching through tighter bureaucratic control characterized by the early waves of reform in the 1980's did not increase student achievement, but was found to be counterproductive" (p.468). It would seem that focusing solely on issues of structure and organization did not bring about the changes in teacher practice sought by these early reformers.

There is a growing literature that places value on teachers' knowledge, experience and perceptions about their work in the classroom as a means to inform school reform. This literature contends that an examination of teacher voice is central to understanding the meanings that teachers attach to their work. A growing number of researchers (Carter, 1993; Janesick, 1994; Pinar, 1994) have called for the use of stories, narratives and autobiographies of teachers in the classroom as means to reflect teachers voices, as well as methods to gain access to their understandings and knowledge of school reform. In addition, Hargreaves (1996) stressed that this "voice" is not singular; to assume such implies that one voice speaks for all teachers and results in decontextualizing teachers from their work settings. It would be necessary to take into account the multiple perspectives held by individual teachers if we are to truly understand the politics and inner workings of any particular school. Criticizing the top-down mandates of the first wave reforms, Spencer (1996) argued:

Teachers have been expected to accept and introduce blueprints for change, regardless of whether they might be workable in their own school context. This static model of change does not serve as a viable framework for understanding the conditions under which teachers can and do change their teaching practices (p. 17)

The recent call for valuing and understanding teacher voice as a means to introduce educational innovations has become a critical element in the successful adoption of many current reform efforts. As more and more exceptional students are being educated in regular classrooms, teacher's perceptions and understandings of the inclusionary process have become increasingly vital ingredients in its success, or failure, as an educational innovation. It is highly unlikely that the mere directive to include exceptional students into regular education classrooms will result in their successful



integration with their regular education peers. Rather, the frustrations and triumphs of all those involved with this inclusionary process need to be taken into account, lest this attempt at innovation meets the fate of those that came before it - lip service to and abandonment by - the teachers who are supposed to unreflectively implement the process. For this innovation to be truly effective more attention needs to be given to the perceptions and understandings of those teachers who will actually be charged its implementation.

### Historical Context

Since the mid-nineteenth century, when the United States embarked on the task of providing a common school education for its youth there has been an inclination to continually investigate the functioning of this unique institution. The tradition of assessing and reporting on schools intensified at the turn of the century as advances in the scientific means to explore human behavior and organizational processes proliferated at a rapid rate (Ginsberg & Wimpelberg, 1988). This tradition of investigating school practice has lead to decades of scrutiny and recommendation by reports that have often been contradictory in nature, scathing in tone, yet vague in substance. The following sections will attempt to identify and describe the nature and significance of the major reform attempts of the twentieth century.

## 1890-1950

The first major national assessment of schools was the Report of the Committee on Secondary School Studies (National Education Association, 1893). Better known as the Committee of Ten Report, this study was a reaction to the uneven quality of high school education of that era. The report documented the seeming lack of uniformity in secondary school programs and college admission requirements and sought to bring harmony to the transition between secondary and higher education. The Committee of Ten stressed "mental discipline." The report recommended that all subjects be taught in the same fashion to all students and that there be no substantial difference between education for college and education for work. The underlying rationale of the Committee's recommendations was that preparation for higher education was also the best preparation for life. Charles Eliot (as cited in Boyer, 1983), then president of Harvard University and committee chair, refused to believe:

That the American public intends to have its children sorted before their teens into clerks, watchmakers, lithographers, telegraph operators, masons, teamsters, farm laborers, and so forth, and treated differently in their schools according to these prophecies of their appropriate life careers. Who are to make these prophecies? Can parents? Can teachers? (p.49)

Within a decade of the release of the Committee of Ten's report, sociopolitical conditions in the United States combined to change the educational outlook of the nation from one that focused on a liberal education for all, to one that was distinctly nonacademic. With the arrival of waves of poor, uneducated and unskilled immigrants from Europe, and the success of trade unions and social reformers for laws banning

children from the nations workplaces, public school enrollment soared and teachers were suddenly faced with the task of educating a radically different student body. No longer was the American secondary school an exclusive enclave of the best and brightest. Rather, it was transformed into a school for the masses (Toch, 1991). It was widely assumed by contemporary educators that not all students would be able to master academic subject matter. This assumption led to the belief that not all those enrolled in schools would be able to perform at the level of the academic elite that schools had previously catered to. This attitude was strongly influenced by the results of the first American experiments in intelligence testing. Robert M. Yerkes development of intelligence tests for the U.S. Army and the development by Lewis Terman of the Stanford-Binet Intelligence Scale offered secondary school educators tools they desperately sought - efficient and scientific ways to manage and sort the mass of new students pouring into the public schools. Historian Lawrence A. Cremin commented on this belief in the power of rational science in his classical study of Progressivism in American education, The Transformation of the School (1964). According to Cremin, after 1908 there was a heightening sense that educational measurement had ushered in a new era in which the promise of efficiency could at last be scientifically fulfilled. The purported ability of intelligence tests to measure the IQ's of students armed educators with the justification to avoid the difficult task of teaching academic subjects to non-elite students. Educational testing made their tracking into less rigorous and more vocational courses of study an easy and reliable procedure (Boyer, 1983; Toch, 1991).

In response to these cultural trends the NEA produced an updated report on the state of American secondary schools, The Cardinal Principles of Secondary Education

(Commission on the Reorganization of Secondary Education, 1918). In this report, the commission expanded school purposes to include health, citizenship, and worthy home-membership. The report viewed the comprehensive high school as one with a core curriculum for all students, variables depending on vocation, and electives to accommodate special interests. The report was noted for a new conceptualization of the secondary school. This new view emphasized a shift away from a singular emphasis on the academic disciplines toward a new interest in meeting the social needs of students. This reconceptualization of the secondary school led to the promotion of school programs with something of value for everyone in attendance (Ginsberg & Wimpleberg, 1988).

This growth of a non-academic curriculum for the uneducated and unskilled masses was also aided by turn of the century progressive reformers and educators. According to Berube (1994), "... progressive education was the first and perhaps greatest educational reform movement in the United States" (p.14). Progressive education was part and parcel of the larger social movement called progressivism, which sought to reform city and national governments, as well as aid poor and unschooled immigrants. Progressive educators who sought to involve schools in this liberating process aided progressivism's commitment to the democratization of American life. John Dewey, leader of the progressive education movement, argued that public education had to be revised so that it more closely matched the everyday lives of students entering the schools (Dewey, 1916). Rather than emphasizing certain classical works, languages and disciplines, Dewey argued that if properly taught, a wide range of subjects were capable of producing "intellectual results". In particular, Dewey urged educators to investigate vocational subjects on the grounds that they were valuable for exploring the

characteristics and meanings of an emerging industrial society (Toch, 1991). Public educators were quick to embrace Dewey's views on democracy and the curriculum, finding in them a rationale for teaching a new, non-academic curriculum to students they strongly believed to be intellectually inferior.

In the period following the publication of Cardinal Principals, attacks on academic education intensified. In the late 1930's two reports, The Unique Functions of Education in American Democracy (National Education Association, 1937) and The Purposes of Education in American Democracy (National Education Association, 1938), both called for schools to generate a new sense of responsibility for the moral and social growth of students. That All May Learn (Dodds, 1939) continued the attack on academic education by pronouncing it to be inappropriate for the "new fifty percent", the mass of newly arrived and less abled students who had swelled the enrollments of high schools. The anti-academic sentiment held by many educators was expressed yet again in the report titled Education for ALL American Youth (National Education Association, 1944) which argued, "There is no aristocracy of subjects.... Mathematics and mechanics, art and agriculture, history and homemaking are all peers." The final report of note during this time period, The Eight Year Study (Aiken, 1942) also seemed to validate the effectiveness of a non-academic, progressive high school curriculum on students later success in college. Results of this massive study indicated students who had attended schools with a child-centered curriculum fared as well, if not better, than students who had attended more traditional elementary and high schools. By the late 1800's the notion of a liberal education for all students had been replaced with one that stressed the

scientific grouping of students into two dramatically different tracks - one demanding and academic; the other functional and vocational.

By the middle of the twentieth century the purpose and scope of public education in the United States had come full circle. At the dawn of the century schools remained privileged spheres - public spaces providing a liberal education to a small elite group of intellectually superior students. However, the explosive growth of immigration coupled with advances in scientific educational measurement created a new path for the public schools. A differentiated curriculum, one that offered academic content for a few and general or vocational content for the masses, replaced the traditional college bound courses of 1900. Paradoxically, as the goal of a universal high school education for all was finally becoming a reality, schools adherence to non-academic curricula severely limited most students' access to any intellectual training. Decades of educational testing, tracking of students into distinctly different curriculums and social promotion of students on the basis of age and attendance allowed schools to provide "something for everyone", while in reality schools seemed to have provided "little for anyone." Despite their assertions regarding the democratic inclination of schools, public educators faced with the responsibility of supplying mass education did not in a serious way try to break with what was essentially a link between social class and educational achievement (Toch, 1991, p.52). By mid-century the issue of student accessibility to a free education had decreased in prominence as most school-aged children in the United States were enrolled in the public schools. At the same time the issue of educational equity took on increased significance in contemporary educational discourse. A rising chorus of voices began to argue that access to the public schools was not in itself a sufficient victory if the country

was to achieve its democratic goal of a quality education for all students. These critics argued that such an egalitarian goal would only be achieved when all students had access to an equal education; not one which tracked some students into a rigorous academic track and others into a less demanding functional track.

### 1950-1990

By the 1950's American society had changed considerably from that of 1900. The percentage of agricultural workers in the work force had declined to about ten percent, and skilled and semi-skilled laborers constituted thirty-five percent of the total. From 1950-1958 technical workers increased from nine to eleven percent of all workers (Ginsberg & Wimpelberg, 1988). As advances in technology caused society to become increasingly more dynamic and complex, many educators began to argue against the teaching methods advocated by their child-centered colleagues. In his critique of the Progressive era, Smith (1947, as cited in Toch) argued:

Here was a doctrine that released the teacher from his responsibility for handing on the traditional knowledge of the race, a doctrine that firmly implied that one need not adhere to any standards of knowledge, but simply cater to individual interests.... With the acceptance of this doctrine American public school education took the easy way to meet its problems (pp. 52-53).

By the mid 1950's the Progressive movement in education came to a close as both the public and government alike, became increasingly concerned with the widening gap between American and Soviet technical prowess. This Cold War rivalry between the world's two super-powers intensified with the 1957 Soviet launch of Sputnik, the first

artificial satellite to orbit the Earth. This event led to the passage of the National Defense Education Act of 1958 that funded improvements in science, mathematics, and foreign-language curricula. Symbolic of educational discourse of the late 1950's was The American High School Today (Conant, 1959), a report which called for school consolidation, and the strengthening of curriculum in the so-called "hard" subjects, such as mathematics, science, and foreign-languages.

The increasing demand for greater academic rigor in the public schools was soon eclipsed in the public's mind by yet another national crusade, the drive for educational equity. Spurred on by the historic 1954 Supreme Court decision in Brown, public education was called upon to serve more equitably the historically by-passed students; the poor, the underprivileged, and the mentally and physically challenged. Schools became battlegrounds in the war for social justice, as public education focused less on academic rigor and more on achieving racial balance and compensation for inherited or culturally imposed handicaps. As more and more minority, poor and handicapped students poured into the classroom, schools reacted in much the same way that their Progressive predecessors had in response to surging enrollments at the turn of the century - by de-emphasizing academic content for these new students. During the 1960's and 70's, there was a tremendous increase in both alternative and remedial courses, as well as in the total number of courses taught in the high schools. Every attempt was made to alter and diversify the curriculum in order meet the unique needs of these new and less-abled students. In the drive to educate this new and diverse student population, educators routed many of them into courses with minimal academic requirements. According to Cremin (1990), "It proved infinitely easier to juggle the substance of the curriculum than



to develop pedagogies for conveying the more intellectually demanding materials to most or all of the students" (p.17). While the drive for educational equity won a place in the classroom for minority, disadvantaged and disabled students, it did not win them a good education. Focusing on the goals, programs, and structures of secondary education, The Kettering Foundation issued its report, The Reform of Secondary Education: A Report to the Public and the Profession (National Commission on the Reform of Secondary Education, 1973). Echoing the concerns of many educators of the era, this report emphasized the importance of meeting the needs of diverse learners. In order to achieve this goal, the report recommended alternative paths to graduation be developed; that course - exemption credits be given for life experience; that affirmative action be used to address past discrimination and that wholly alternative schools be developed. Reflecting the turbulent mood of the nation, a time during which America was convulsed by the war in Vietnam and wracked not only by riots in urban ghettos, but on college campuses as well, former United States Commissioner of Education, Sidney Marland (as cited in Duke, 1978) wrote:

What I am saying is that there is manifest in this country, to my knowledge the first time in our history, an active loss of enchantment with our schools.... There is a growing doubt about the results of the educational process as it is presently arranged, a lively distrust fostered by some scholars, as to whether the education process benefits those who experience it. For the first time, Americans in significant numbers are questioning the purpose of education, the competence of educators, and the usefulness of the system in preparing young minds for life in turbulent times. (p.96)

The late 1970's represented an end to an era in American education. Along with an increasingly conservative political mood that led to the election of President Ronald Reagan in the early 1980's, many critics began attacking the underlying premises of

educational utilitarianism. Educational discourse began speaking, not in terms of educational equity. Rather, the call for academic excellence reemerged on the educational landscape. Critics were harshly critical of the civil rights and antipoverty movements of the 1960's and 70's, arguing that in the zeal to encourage the fullest participation of all types of students in the nation's schools, that educational access had been emphasized at the expense of the quality of educational programs.

The first notable report of the 1980's, The Paideia Proposal (Adler, 1982), brought to educational discourse the philosophical idea that truth is knowable and that the ends of education are the same for all persons. The report outlined the three basic objectives for schooling: to provide a child with the opportunity for personal development, to prepare the child to be an intelligent citizen, and to train the child in a non-specific way as a future wage earner. In a break with the utilitarianism of education that held sway during the 1960's and 70's, the Paideia group envisioned schooling as a general and liberal undertaking, with a single 12 year course of study for all students. Addressing the concern for the quality of school programs, The Paideia Proposal emphasized the quality of learning and teaching, as well as the quality of homework. The report also called for teachers themselves to receive a general and liberal preparation (Paideia), coupled with advanced training and supervised clinical experiences. In such a manner, all students would be exposed to a rigorous and challenging curriculum that would be delivered by highly knowledgeable and trained teachers. Echoing the call for the same course of study for all students was Making the Grade (Twentieth Century Fund Task Force on Federal and Secondary Education Policy, 1983). This report recommended that all students be instructed in reading, writing, calculating, science,

foreign languages, civics and a rudimentary knowledge of computers. In addition, Making the Grade also recognized the need for improved teacher training by calling for the creation of a federally funded master teacher program that would recognize and reward excellence in teaching at a five year cost of around \$5 billion. Echoing the call for a core curriculum was High School: A Report on Secondary Education in America (Boyer, 1983). This report called for all students to initially be placed on one track and study a core curriculum consisting of literature, U.S. history, non-Western civilization, science and the natural world, technology, math, foreign language, the arts, health and civics. In later years, students would choose from elective clusters. High School also advocated equal concern for the needs of gifted and remedial students. It was quite evident from the tone and substance of these reports that equality of education was not judged as the mere presence of disadvantaged and exceptional students in classrooms. Rather, equality was linked to academic excellence for all students. Perhaps the most important of the reports of the 1980's was A Nation at Risk. According to Ginsberg and Wimpelberg (1988):

This watershed report criticized high school curricula as diluted by electives and courses in physical health and remedial subjects. The report thought that subjects like math, foreign languages, the sciences and geography were under-emphasized, and that teachers assigned too little homework. It concluded that the use of competency tests was excessive, college admissions too open and textbooks inadequate, American schools were found to spend too little time on class work and to spend it ineffectively. On the subject of teachers, the report was alarmed at the poor quality of students entering teaching, the shortage of teachers in math and science, and the quality of preparation programs available to prospective teachers (p.58).

Clearly, A Nation at Risk and all the major reports of the 1980's concerned themselves with academic excellence, or more precisely the lack of excellence presented

by American schools of that era. The first wave of school reform emphasized the need for all students to have a high level of understanding of academic subjects, to have a capacity for problem solving, and have the ability to apply knowledge in concrete situations. This emphasis on standards culminated with the formulation of six national goals for education by President George Bush entitled America 2000: An Education Strategy (1991) and the publication of What Work Requires of Schools A SCANS Report for America 2000 (Secretary's Commission on Achieving Necessary Skills, 1991). While these reports recommended changes in curricula, longer days or years of study, or any number of other technical innovations, it is important to note that these same reports tended to avoid recommending any structural changes in the ways schools were organized and instruction delivered (Kamii, Clark & Dominick, 1994). According to Cuban (1990b) these goals failed to answer two seldom asked but critical questions: To what degree would these national goals and performance standards reverse, alleviate, or worsen the conditions in big city school systems? And in what ways would national goals and performance standards reshape contemporary subject matter and teaching practices (p.270)? In addition, while such national goals might equip students with the knowledge and skills necessary to compete in the global economy they were believed to be incapable of producing thoughtful and autonomous students. Such qualities in students were deemed by many educators as necessary for the success and survival of a democratic society (Kamii, Clark & Dominick, 1994). Numerous studies examining student outcomes at the end of the first wave of school reform were less than optimistic about the effectiveness of such top-down initiatives. Academic achievement did not seem to have improved over the previous decade by most measures (National Center for

Education Statistics, 1989); performance was extremely weak on higher level problem-solving skills (Mullis & Jenkins, 1990); dropout rates and rates of retention were stuck at unacceptably high levels for the decade (Frase, 1989); and students' attachment to school, such as membership in school activities showed a high level of alienation among significant portions of school-aged children (Wehlage, 1989). So while first wave reformers had set ambitious goals and standards for student learning, evidence did not indicate that the top-down driven reform policies of the era had been successful in obtaining the desired achievement outcomes. Academic excellence it seemed, was not yet at hand.

## 1990's

The lack of student success despite impressive amounts of standard-setting and other technical innovations imposed by all levels of government, as well as local boards of education led to a second wave of school reform. This second wave extending from the early 1990's to the present, focused on restructuring the fundamental ways in which schools were organized, how teachers taught, and how students learned. Although the term restructuring has taken on many meanings, most advocates of restructuring believe that changing the way schools are organized will cause teachers to teach differently; hence all students will learn differently, and the overall performance of schools will increase (Elmore & Associates, 1996; Elmore, Peterson & McCarthy, 1996; Newmann, 1996). In education the term restructuring is noted for its ambiguity as for its meaning (Conley, 1993). Although restructuring has no precise definition, the term suggests that

schooling needs to be comprehensively redesigned. According to Newmann and Wehlage (1995) structural reforms may include, but are not limited to: decentralization, shared decision making, school choice, schools within schools, flexible scheduling with longer classes, teacher teaming, common academic curriculum for all students, reduction of tracking and ability grouping, external standards for accountability and new forms of assessment, such as portfolios (p.1).

Perhaps one of the most widely heralded structural reforms of the 1990's is that of School-Based Management (SBM). While this reform goes by many names: school-based management, school-based improvement, teacher empowerment, or shared decision making, according to Chion-Kenny (1994) whatever the label, true site-based management systems operate with a number of common beliefs: 1) Decisions should be made at the lowest levels. 2) Teachers play an important role in the process. 3) Schools make more efficient use of scarce resources at the local level. 4) Parents play an important role in the process. 5) Change will be more effective and more lasting if those who carry out the change feel a sense of ownership of the process. The concept suggests individual schools take more responsibility for what happens to children under their jurisdiction and attending their schools. Furthermore, in light of the increasing demand for school accountability of student outcomes, this development makes the school the focal point of such evaluation and places the burden to do something about meeting the educational needs of students at that site. According to Candoli (1995) as states began to realize that previous reforms had not been effective in changing the way students performed, that educational reform could not be mandated from the top, the pendulum shifted from the state level to the district level and, more importantly, to the school-site

level. SBM rests on the belief that the best decisions are those that involve the people at the level closest to the decision being addressed. According to the National Association of Secondary School Principals (1991, emphasis in the original), "When school-based management is working well, more decisions flow *up* through the system than *down* from the top. "That is another way of saying that the purpose of SBM is to see the school as the center of change and not the target of change (Chion-Kenny, 1994). SBM was seen as a means to empower staff at the school-site level not only to decide exactly what factors were thought to impact upon poor student achievement. SBM was also seen as a means that might allow this site-based staff to design unique responses to local problems in a manner that state and district level personnel could not possibly hope to achieve due to their distance from the situation.

Although many forums such as the National Governors Association, the Business Roundtable, The National Education Association and The American Federation of Teachers have endorsed SBM as one of the most widely adopted reform tools of the era, its effectiveness in impacting student achievement is considered by many researchers as primarily theoretical. Fullan (1991) concluded that restructuring reforms that devolved decision making to schools may have altered governance procedures, but did not affect the teaching-learning core of schools. Taylor and Teddlie (as cited in Fullan, 1994) drew similar conclusions in a study that examined schools having established SBM programs and other schools that had no such programs. Results of this study indicated that teachers in the SBM schools did indeed report higher levels of participation on decision making, however they found no differences in teaching strategies evident in these SBM schools. Likewise, Weiss (as cited in Fullan, 1994) studied SBM in twelve high schools in eleven

states. Results showed that schools with SBM did not pay more attention to issues of curriculum than traditionally managed schools and pedagogical issues and student concerns were low on the list for both sets of schools. Such negative results concerning the effectiveness of SBM as a reform tool may be best understood if one considers them to be premature attempts at systemic change. When little effort is made to link structural changes such as SBM to new goals and visions they are often viewed by teachers as being capricious or illogical. In a review of research on school-based management efforts of inner-city schools, David (1989) reported: 1) Most school councils dealt with few issues more difficult than creating a new behavior code or decorating an entranceway, and 2) Site-based managed schools created the external conditions for effective schools, but the internal conditions such as developing a coherent mission statement mattered equally. It would seem that decentralized initiatives as far as evidence is concerned, are not faring any better than previous centralized reforms. Prior definition of goals, visions and strategies seemed to be necessary components for structural changes such as SBM to make sense to those involved in the change process.

It seems as if education at the twilight of the twentieth century is on the verge of a third wave of school reform; one that attempts to combine the top-down initiatives of the first wave with the restructured governance of the second wave. Such a third wave has already been termed systemic reform. According to Smith and O'Day (1991) this reform strategy works simultaneously by:

Increasing coherence in the system through centralized coordination and increasing professional discretion at the school site. Thus while schools have the ultimate responsibility to educate thoughtful, competent, and responsible citizens, the state - representing the public - has the



responsibility to define what "thoughtful, competent and responsible citizens" will mean in the coming decade and century. (p.254)

This latest wave of school reform seeks to align the different parts of the system, to focus on the critical issues, and to gather and coordinate resources in agreed-upon directions. Various states have already begun to implement their own versions of this coherent reform process. In 1990 Kentucky enacted the Kentucky Education Reform Act, a top-down and bottom-up effort, which at the time was one of the most comprehensive, statewide restructuring movements ever attempted in the United States. The Kentucky Department of Education developed world-class curriculum standards, an authentic assessment system, and a system of school accountability that linked sanctions and rewards to demonstrated student achievement. In addition to these top-down mandates, the Education Department also promoted bottom-up initiatives by providing teachers with numerous professional development activities such as SBM, performance assessment and other research-based instructional practices (Steffy, 1993). Other states followed suit including the Vermont Common Core of Learning (Vermont Department of Education, 1991), the New Compact for Learning (New York State Education Department, 1994), Blueprint 2000 (Florida Department of Education, 1994) along with curriculum frameworks in California, South Carolina, and Texas. Such systemic reform efforts may be characterized as responses to the fragmented and incoherent conditions that were imposed upon schools by decades of ill conceived and thoughtlessly adopted educational change efforts, as well as the endless streams of regulations emanating from Washington and state capitols. According to Fullan (1996), "The idea of systemic reform is to define clear and inspiring learning goals for all students, to gear instruction to focus

on these new directions, and to back up these changes with appropriate governance and accountability procedures" (p.420). In such a manner policymakers continue to set policy, establish standards and monitor performance while at the same time teacher voice that is engendered and amplified by structural changes such as SBM allow individual school-sites to develop unique solutions to their particular problems.

An underlying assumption of the third wave of school reform rests on the notion that centralized and decentralized strategies are both essential if schools are to be effective and students are to achieve at the highest possible level. Top-down strategies by themselves are problematic because complex change processes cannot be controlled solely from the top. Senge (1990) points out the illusory nature of top-down control of schools by reminding the reader that, "The perception that someone 'up there' is in control is based on an illusion - the illusion that anyone could master the dynamics and complexity of an organization from the top" (p. 290). One need only look at the host of unplanned changes and problems that confront schools of the 1990's to realize that planned educational change is nonlinear and complex. Technological developments, shifting demographics, family and community breakdowns, economic and political pressures and bitter bureaucratic battles make it highly unlikely that even the strongest leader could possibly control and orchestrate all these events. Likewise, bottom-up strategies alone often fail because groups get preoccupied with governance issues and flounder when left on their own. According to Fullan (1994), "Even when they are successful for short periods of time, they cannot stay successful unless they pay attention to the center and vice-versa" (p.37). While it may be possible for schools to become highly collaborative despite assistance from the district level, it is unlikely that they will

remain that way for long periods of time unless the district-local relationship becomes an ongoing, mutually reinforcing process. The moving of personnel, transfers, changing staff development resources and other budget considerations dictate that district and local units need each other if the process of planned educational change is to flourish at these school-sites.

In order to fully understand the mutually shaping forces that both the district and the school-site bring to bear upon each other, it is necessary to discuss the relative roles that each play in the day to day operations of the system. According to Fullan (1994) the district: 1) Helps to formulate general direction, 2) Stimulates and responds to local action, 3) Gathers information and gives feedback on performance, and 4) Provides resources and opportunities for continuous staff development. The school-site: 1) Takes action, 2) Works on shared vision, 3) Develops collaborative cultures, 4) Monitors and solves problems, and 5) Responds to external agencies and events. It is apparent from these roles that neither the district nor the local school site are capable of fully controlling the direction of, or possess the means to influence the outcomes of planned educational change. In addition to evaluating the roles that the district and school-site play in the process of educational change, the sequence of events in this process must also be taken into account. In a study of twenty-six companies involved in corporate renewal, Beer, Eisenstat and Spector (1990) found that individual, small group (bottom-up) behavior changed first, which in turn was reinforced and further propelled by changes in formal (top-down) procedures and structures. This analysis led Fullan (1994) to conclude:

Initiatives occur at both the district and school levels, at first in an uncoordinated fashion. Action and variation at the school level is allowed and encouraged. As people gain clarity and skills through experience, and

as training and new approaches to selection and promotion begin to accumulate, greater consistency is achieved; and pressure mounts to alter the organization that is now experienced as ill-fitted to the new emerging patterns (p.198).

As schools in the 1990's search for ways to deal with increasingly heterogeneous student bodies, dwindling resources, and conflicting demands from all segments of society, all members of the educational community are now expected to take part in the change process. Guidance and resources from the top-down as well vision and action from the bottom-up are seen by many in the educational community as key factors in school effectiveness and student achievement.

### Summary of Planned Educational Change

Public schools in the United States have long been viewed not only as institutions charged with the betterment of individual students. Since the founding of the republic, they have also been viewed as powerful devices for achieving change in society at large. Whether called upon to form and preserve a national character; to control the effects of massive waves of immigration; to deal with the results of decades of poverty and discrimination; or to ensure the preeminence of American industrial might, public schools have been looked to time and again as the one sure means of finding solutions to pressing national problems.

The road to school reform has not always been linear and direct. Just as change itself is a complex and at times almost chaotic process, school reform in the United States has of necessity had to respond to multiple and often conflicting sets of issues. Political

and economic demands, changing demographics and technological innovations have caused numerous reform efforts to appear, fall out of fashion and disappear, only to return at a later date under different names and guises. This cyclical yearning for some golden age of schooling has caused many to accuse the public schools of adopting and abandoning reform efforts with far too much ease. The propensity for schools to "jump on the latest bandwagon" has also led to incoherence in both school policy and classroom instruction. As a result of this knee-jerk adoption and systemic incoherence, the public schools have come to be perceived by the public, business and government alike as being ineffective and in need of radical reform and restructuring.

While it may appear that American schools are indeed prone to adopting the latest fad, in reality schools have not really changed much over the last century. The structure and organization of schools, the grouping and classification of students, the ways teachers and students relate to one another, and how both students and teachers construct knowledge have remained relatively static over the past one-hundred years. Schools have alternately focused on academic knowledge, vocational knowledge, or some combination of the two. However, the core of schooling has remained stable in spite of all the debates regarding the relative worth of one approach to education over another. Debates have not only focused on the worthiness of particular forms of knowledge. Educational discourse has also concerned itself with the appropriate methods schools should use to maximize student achievement. Since mid-century every attempt has been made to increase the effectiveness of the public schools: from compensating for the deficiencies in the outside lives of students; to the setting of world-class curricular standards; and more recently to changing the structures that govern the everyday lives of teachers and students.

As the twentieth century comes to a close educational discourse has begun to focus on the thoughtful alignment of all parts of the educational puzzle in the quest for academic equity and excellence. The call for systemic school reform requires more than the mere tinkering with of existing school structures. Such reform requires a change in both the familiar organization and governance of schools. It is thought that we need to examine the methods and groupings used for instruction, the curriculum and assessment tools determined to effective for achieving and measuring school success, as well as the structures that govern such newly reformed schools. Educational discourse on systemic reform has also called for the voice of all stakeholders to be taken into account lest ideas that are easily mandated might also be easily discarded by those charged with their implementation. Coupled with the change in the familiar grammar of school, calls have also been heard for changes in the core practices of schools. The ways in which both teachers and students construct and utilize knowledge need to be further examined so that schools may truly become effective and students achieve at their highest levels.

### The Implementation of Special Education Reform

Despite the conviction held by Blankenship and Lilly (1981) that for practically all the history of civilization, education has been for the elite, and educational practices have reflected an elitist orientation, attempts to include all students in the mainstream of education have persisted throughout American history. Although institutionalized and segregated education was the norm during the nineteenth and most of the twentieth centuries, recent years have witnessed a movement toward the inclusion of many

previously segregated learners into the mainstream of education. The changing nature of public opinion towards exceptional students, coupled with court decisions regarding the quality of segregated education and government mandates calling for the equality of educational experiences for all students have all been efforts leading toward achieving the oft-stated goal of universal mainstream education in the United States. The following sections attempt to describe and explain the evolutionary process of special education reform; first by examining the historical context within which this inclusionary process has taken place, and second by examining the impact planned educational change has had upon special education

### Historical Context

For most students considered poor, minority or disabled in early America, the first hurdle was to merely receive an education; integration into the mainstream would come much later (Stainback & Stainback, 1995). In the early years of the republic there were no public provisions for children or adults with special needs. They were "stored away" in poorhouses and other charitable centers, or worse, left at home with no educational provisions (Kirk & Gallagher, 1989). Special education began in the United States in 1823 with the establishment in Kentucky of a state school for the deaf. In 1852, Massachusetts enacted the nation's first compulsory education law; a law that explicitly permitted the exclusion of children with handicaps from required attendance. In 1857 the Columbia Institution for the Instruction of the Deaf and Dumb and the Blind (now Gallaudet University) opened in Washington, D.C. Public school education for people

with disabilities began in Boston in 1869 with a school for students with hearing impairments. A separate class for students with mental retardation was established in Providence, R.I. in 1896. By 1905, New York City had created its first nonresidential school for truants, delinquents, and "incurable" children; part of the rationale for this school was that removing those students from regular classes would benefit those who remained (Lipsky & Gartner, 1997). While attempts toward inclusion were being made, it should be emphasized that not all disabled students were receiving an education during this time period. It was estimated that as late as 1850, sixty percent of the inmates in this country's poorhouses were people who were blind, deaf, "insane", or "idiots" (National Advisory Committee on the Handicapped, 1976). Those who were being educated often did not receive it in the public schools. Rather, instruction was provided for such students in asylums or government or church-supported institutions (Stainback, Stainback & Bunch, 1989). While special classes and special day schools began to gain momentum during the first half of the twentieth century, educational programs in asylums and residential institutions for students with disabilities remained the dominant forces in educating exceptional students until the 1950's. In 1945, a panel at the Council for Exceptional Children convention recommended that children with educable mental retardation be included in general school settings. In the 1950's and 60's, special classes in public schools became the preferred educational delivery model for most students with disabilities; however, residential institutions and special schools remained the norm for students who were blind, deaf, and physically disabled (Stainback & Stainback, 1995). It would seem that the process of including exceptional students in the mainstream of education has been attempted in varying increments, with varying degrees of success



since the early days of American education. However, it would take a ruling by the United States Supreme Court to really set the impetus for the inclusion of exceptional students into regular school settings into motion.

In 1954, Chief Justice Earl Warren ruled that "separate is not equal" in the landmark case Brown v. Board of Education. While this case was primarily meant to end decades of racial discrimination in American schools, it also led the way toward the increased study of exclusionary policies for students with disabilities. According to Gilhool (1997), the chief advocate for the defense in Brown, John W. Davis, argued, "...if black children should succeed in Brown, the benefits of schools could no longer be denied on the ground of gender or on the ground of mental capacity" (p.267). In addition to the ruling in Brown, parents of exceptional children had begun to organize and initiate advocacy activities for educating their children, an event that caused the push toward inclusion to gain increased momentum. Groups such as The National Association for Retarded Citizens began to advocate for the right of exceptional students to learn in more normal school environments alongside their peers. Several studies were published in the 1960's that questioned the efficacy of special classes for students with mental retardation. Key among these studies was Special Education for the Mentally Retarded: Is Much of it Justifiable? (Dunn, 1968). This landmark study argued: 1) There was little evidence to show that the achievement of exceptional students in special classes was better than the academic progress of such students in regular classes, 2) Labels accompanying special class treatment were stigmatizing, 3) General education was capable of providing effective instruction to exceptional students, and 4) Self-contained classes for mentally

retarded students contained a disproportionate number of African-American students due to the virtual reliance on IQ tests used for placement decisions.

During the late 1960's and 1970's, Congressional efforts towards providing federal aid to exceptional students quickened. In 1966, Congress added Title VI to the landmark Elementary and Secondary Education Act of 1965 (PL 89-10). Title VI established a program to aid state efforts to educate exceptional students and also established the Bureau of Education for the Handicapped (BEH) in the U.S. Office of Education. In 1970, Title VI was supplanted by the Education of the Handicapped Act (EHA) (PL 91-230), which continued the new bureau and its state aid program and added additional support for equipment, school construction, personnel preparation, and research and demonstration programs. In 1973, disability advocates won a major victory with the passage of the Rehabilitation Act (PL 93-112), including its civil rights component in Section 504 which guaranteed the rights of persons with disabilities in employment and in educational institutions that received federal monies.

If the momentum towards inclusion was quickened by such governmental mandates, court suits in two different circuits ensured that exceptional students would be guaranteed access to a free public education. In the case of the Pennsylvania Association of Retarded Citizens (PARC) v. Pennsylvania (1972), the consent agreement stipulated that children could not be denied admission to school and that schools could not change a student's placement without due process. The court furthermore expressed a preference for integration of these exceptional students over more restrictive placements. In the case of Mills v. Board of Education (1972) the court decided that the Board of Education in Washington D.C. not only had to educate exceptional students. It also ruled they could

not deny exceptional students such a right because of financial limitations any more than they could deny such a right to non-exceptional students. Not only had the courts established exceptional student's rights to an equal education with the Brown ruling, the decisions handed down in PARC and Mills guaranteed that such an education would be public and free.

All of this congressional and judicial activity led up to the watershed event in the education of exceptional students - the passage in 1975 of the Education for All Handicapped Children Act (EHCA) (PL 94-142). With the passage of this act, the exclusion of exceptional students from the public schools, banishment that had lasted for nearly two centuries had finally, and officially, come to an end. According to Gearhart, Weishahn, and Gearhart (1984) this act directed public schools to ensure that:

To the maximum extent appropriate, handicapped children are to be educated with children who are not handicapped, and special classes, separate schooling, or other removal of handicapped children from the regular educational environment occurs only when the nature or the severity of the handicap is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily (p.27).

PL 94-142 was both a funding law and a law that provided substantive rights. A later federal court decision, Smith v. Robinson (1984) identified both these features:

The [law] was an attempt to relieve the fiscal burden placed on the States and localities by their responsibility to provide education for all handicapped children. At the same time however, Congress made clear that the [law] is not simply a funding statute...[T]he Act establishes an enforceable substantive right to a free appropriate public education.

Six key principles lay at the heart of PL 94-142, principles that have shaped the nature and delivery of special education services for the past quarter-century (Kirk &

Gallagher, 1989): 1) Zero reject, or the inability of local school systems to deny exceptional students the right to a free and appropriate public education, 2) Nondiscriminatory evaluation, or the right of exceptional students to an individual and culture-free examination before being placed in a special education program, 3) Individual Education Program (IEP), an individualized education plan written for each exceptional student that takes into account current performance and goals, the particular services to be delivered, and the procedures by which outcomes will be evaluated, 4) Least Restrictive Environment (LRE), or as much as possible, educating exceptional students in settings with their non-exceptional peers, 5) Due process, or a set of legal procedures used to ensure the fairness of educational decisions, and 6) Parental participation, or the inclusion of parents in the development of the IEP and access to their children's educational records.

In many ways, the implementation of PL 94-142 has been one of the finest achievements of American public education. According to Lipsky and Gartner (1989) over 650,000 more students were being served than when the law was enacted; funds devoted to special education had increased substantially, from \$100 million in FY 1976 to \$1.6 billion in FY 1985; exceptional students had finally gained access to a free and appropriate public education and due process rights were put in place for these students and their parents (p.8). However, the operation of parallel programs and systems for students considered "normal" and for others labeled "exceptional" began to be a source of concern for some educators.

According to Walker (1987):

If the law has been massively successful in assigning responsibility for students and setting up mechanisms to assure schools carry out those responsibilities, it has been less than successful in removing barriers between general and special education. PL 94-142 and other policies of the time did not anticipate the need to take special steps to eliminate turf, professional, attitudinal, and knowledge barriers within public education. It did not anticipate that the artifice of delivery systems in schools might drive the maintenance of separate services and keep students from the mainstream (p.109).

The law itself did not require the largely separate and unequal special education service that had developed (Lipsky & Gartner, 1989, 1997; Goodlad & Lovitt, 1993; Stainback, Stainback & Bunch, 1989; Stainback & Stainback, 1995). Despite the emphasis in the law on identification, certification, and classification, the process described did not demand separate categorical programs for exceptional students. Indeed, it required no categorical programs at all (Lipsky & Gartner, 1989). What the law did require was the placement of students in the least restrictive environment. It was this provision of the law that provoked widespread debate at the time of its implementation; a debate that continues up until the present day as schools of 1990's continue to grapple with the problem of including exceptional students in the regular classroom. Did LRE mean that all children, regardless of the severity of their disabilities, would be mainstreamed? Did it mean that some exceptional students would be excluded and placed in separate classrooms? What criteria should be used to make such drastic placement decisions? While the passage of PL 94-142 entitled exceptional students access to a free and appropriate public education alongside their peers, the lack of clarity surrounding the LRE principle required that practitioners, namely principals, teachers, and parents define it in practical terms. It was left up to schools themselves to demonstrate exactly what shape special education would take in future decades.

The furor created by lack of consensus regarding LRE may not be hard to understand in light of the intractability schools pose when faced with novel programs and directives. This top-down mandate ran into resistance immediately upon implementation when faced with the predictable logic and grammar of schools. Regular teachers were not prepared personally or professionally to accept these exceptional students in their classrooms. Furthermore, teachers viewed this inclusionary attempt as one more in a long line of other reforms, that if properly ignored might simply "go away." Nor did the culture and structure of schools facilitate the implementation of the law. The widespread isolation of teachers did not support the collaborative nature of the identification and classification process required by PL 94-142. In addition, the very structure of schools with their compartmentalized classes and factory-like schedules did not particularly suit the cognitive and behavioral demands placed on the system by exceptional students.

In the years preceding the passage of PL 94-142, LRE was expressed through the concept of mainstreaming, a method of delivering educational services thought by many researchers (Biklen, 1985, 1992; Brandt, 1989; Johnson, 1993) as being both effective and equitable. Although not a legal term, mainstreaming emphasized the place in which special education took place; it assumed the existence of two separate systems - general and special education - and was applicable to those exceptional students who were considered to be most like "normal" (Lipsky & Gartner, 1997). In a discussion regarding the nuances of meaning between the terms integration and mainstreaming, Biklen (1985) advised that mainstreaming, "...is the more popular word for integrating students with disabilities into regular classes and / or into regular schools in self-contained classes.... This may occur in regular classes, lunchrooms, hallways, particular subjects, assemblies,

and extracurricular activities" (p. ix). Many contemporary educators believed mainstreaming to be a practical and acceptable interpretation of the LRE principle contained in PL 94-142.

There were two widely held assumptions underlying the characteristics of exceptional students that popularized mainstreaming in the eyes of its proponents. The first, readiness, obligated exceptional students to "prove they were ready" to be placed in the regular classroom by means of improvements in academics and / or behaviors. The second, student deficits, posited that exceptional students presented some cognitive or physical deficit, placing the locus of the problem solely on the students themselves. Both of these assumptions led schools to believe that when deciding the LRE for exceptional students, that schools themselves - the ways in which they were organized and knowledge constructed - were not a part of the problem. Rather, schools only took exceptional students perceived disabilities into account when deciding what educational placement was appropriate for them. The assumption regarding student deficits posed a dilemma for some educators who believed that scientific educational measurement was incapable of evaluating cognitive processes that were perceived as being too complex to be measured by existing educational tests. According to Ysseldyke (1987) there was no defensible psychometric methodology available at the time for reliably differentiating students into categories. Nevertheless, mainstreaming remained the preferred model used to comply with the LRE principle of PL 94-142. Educational services were delivered along a continuum of locations each matched to the student's "deficits" and disability; the phrase cascade of services was also widely used to describe this process (Lipsky & Gartner, 1997; Kirk & Gallagher, 1989). Paradoxically, while the

spirit of PL 94-142 intended for exceptional students to be more included in the school community, the cascade of services developed by educators in response to the law's LRE principle effectively isolated many of these students in self-contained classrooms and special centers.

While mainstreaming was an improvement over the exclusionary practices of schools in the past, it suffered from the same fundamental flaw that was inherent in the LRE. Taylor (1988) pointed out the lack of clarity in defining LRE in practical terms: 1) It legitimized restrictive environments by accepting segregated settings for some exceptional students. 2) It confused segregation and integration on the one hand with intensity of services on the other; the implication being students who had need of more intensive services needed to receive them in more restrictive settings. 3) It was based on a readiness model; that is students' had to prove they were ready to be placed in a regular classroom. 4) It directed attention to physical settings rather than to the services and supports exceptional students needed to be integrated into the community. The lack of a practical definition of mainstreaming confounded contemporary reform efforts, just as defining LRE in practical terms continues to plague educators in the 1990's as they attempt to include special education into the framework of current school-wide reform efforts.

As time passed many researchers ( Bruiniks & Others, 1988; Carlberg & Kavale, 1980; Edgar, 1987; Glass, 1983; Hagerty & Abramson, 1987; Kavale & Glass, 1982; Reynolds & Wang, 1983, Ysseldyke, Thurlow, Christenson & Weiss, 1987) began to question the efficacy of segregated special education services that were developed in response to PL 94-142. Negative student outcomes on measures of academic



achievement, student self-esteem and in post-high school employment opportunities were used as the basis for a call for a more extensive restructuring of special education.

Madeline Will, then assistant secretary in the U.S. Department of Education amplified this call for more extensive reform in 1986 by suggesting that general and special educators share responsibility of exceptional students. Will's efforts, labeled the Regular Education Initiative (REI), were based upon previous research, especially that of Reynolds and Wang (1983). The REI attempted to find ways to serve exceptional students in regular classrooms by encouraging collaborative partnerships between special and regular educators. Commenting upon federal commitment to the merging of regular and special education, Will (1986) reported:

The heart of this commitment is the search for new ways to serve as many of these children as possible in the regular classroom by encouraging special education and other special programs to form partnerships with regular education. The objective of the partnerships for special education and the other programs is to use their knowledge and expertise to support regular education in educating children with learning problems (p.20).

The REI created a furor in educational discourse. Many special educators responded defensively, denying the need for change as well as questioning the ability and desire of regular teachers to effectively teach exceptional students in their classrooms (Lloyd, Singh, & Repp, 1991; Kauffman & Hallahan, 1995; Stainback & Stainback, 1992). Other dissenters (Kauffman, 1988; Kauffman, Gerber & Semmel, 1988) argued that a new revolution might mean a loss of hard-won rights and, in the worst case, a full circle return to the unacceptable conditions that existed before passage of PL 94-142. (Skrtic, 1991). Regular educators, already trying to come to grips with the new standards that were formulated during the 1980's, and under pressure to increase the achievement

scores of students' in their classrooms, were less than positive about this new situation. While the REI call for the merging of special and regular education systems was considered radical at the time, it still acknowledged the separateness of both systems by encouraging collaboration between two *distinct* groups. Additionally, the REI continued to require that exceptional students be evaluated and assigned a label, something that was not required of their non-exceptional peers. Nonetheless, whatever its weak points the REI served to "break the ice" regarding issues of special education reform and thus provided an opening for the more substantive change that would be called for in the near future.

### The Impact of Educational Change on Special Education

According to Skrtic (1991) the REI debate produced numerous proposals for the merging of special and regular education, each of which, to one degree or another, called for eliminating the classification system of PL 94-142 and the pull-out approach of mainstreaming (p.157). Each also proposed a restructuring of the dual special-regular education systems into a new system in which, depending on the proposal, most or all students would receive assistance with learning problems in regular classes. Although all the proposals agreed that this merger should be flexible and collaborative in nature, they disagreed on which students should be integrated into the new system on a full-time basis (Skrtic, 1991). Each of the proposals declared that all exceptional students should remain in regular classrooms on a full-time basis and receive any support necessary to assist with learning problems in those classrooms. What they differed on was which students

classified as exceptional should be served in such a manner and what parts of the dual education systems should actually merge.

The first proposal (Pugach & Lilly, 1984) is the least inclusive in that it includes only the vast majority of students labeled mildly handicapped. Students with moderate, severe and profound labels would be taught by special educators in separate settings in the regular school. The second proposal (Reynolds & Wang, 1983; Reynolds, Wang & Walberg, 1987) was somewhat more inclusive in that it maintained most exceptional students should be served in regular classrooms on a full-time basis. The option of special placement was reserved only for students labeled severely or profoundly disabled. Similarly, the third proposal included all exceptional students, except those labeled severely or profoundly disabled. The fourth proposal (Stainback, Stainback & Forest, 1989) was the most inclusive in that all exceptional students, including those labeled severely and profoundly disabled, would be full-time members of regular classes. A fifth proposal, Winners All: A Call for Inclusive Schools (National Association of State Boards of Education, 1992) called for exceptional students to receive educational services in regular education classes. According to Winners All, "Included students are not isolated into special classes or wings...To the maximum extent possible, students receive services in the general education classroom with appropriate in-class support." (p.12).

In terms of current terminology, the first three proposals would be considered examples of inclusion classes, while the fourth and fifth proposals would be considered full inclusion classes. The difference between these two terms is one of amount of exceptional students that are served in on a full-time basis in regular education classrooms. Inclusion assumes some or most exceptional students will have such a

placement, while other more severely or profoundly disabled students will remain being served in separate special education classes. Full inclusion assumes all exceptional students will be served in the regular classroom, with support services to help with learning problems being "pulled-in" to that classroom rather than students being "pulled-out".

Although it was commonly assumed that the call for merging special and regular education into one unitary system of education was implicit in all the proposals, in actuality only the Lipsky and Gartner; Stainback, Stainback and Forest, and Winners All proposals called for a merging at the classroom level. The other two proposals called for the merger of instructional support personnel above the classroom level, such as resource room and other specialists. The Lipsky and Gartner proposal was by far the most radical with regard to what parts of the two systems would merge. This report called for a unitary system in which education is "...both one and special for all students" (Lipsky and Gartner, 1989, p.73). According to Skrtic (1991), "Such a system would mean the complete abandonment of a separate special education system for students with mild to moderate disabilities (p.159). Winners All also called for the merging of services at the classroom level. It sought to create a fluid classroom in which a variety of professionals would work with students. According to the report, "These professionals would include the general and special education teachers, and other support personnel.... It is not necessary for classroom teachers to direct and control all activity that takes place in the classroom" (p.14). Both the Lipsky and Gartner proposal with its focus on the classroom level, as well as Winners All with its focus on changing core practices were intimately linked to the wider excellence movement which was occurring simultaneously in general

education classrooms. As such, the basic assertion of these proposals is that, through the broad adoption of the principles and practices identified in effective schools research, "...the education of students labeled as handicapped can be made effective (Lipsky and Gartner, 1987, p.281). While the primary focus of these proposals was to improve the school lives of exceptional students, the call for collaboration and for the changing of core practices in both instruction and grouping of students brought special education reform into closer alignment with general school-wide reform efforts. It seemed as if special educators had begun the same journey already started by their regular education colleagues. A point of congruence between school effectiveness and the movement towards increased inclusion is that both require a new approach, one that puts students at the center of educational reform (Lipsky and Gartner, 1997, p.212). No longer was the onus for poor achievement placed squarely on the shoulders of exceptional students alone. Rather, schools themselves were now being challenged to change their core practices, to become more effective and collaborative, so that all students, exceptional as well as regular, could succeed in regular classes. According to Sapon-Shevin ( as cited in O'Neil, 1994-1995):

Inclusion will succeed to the extent it links itself with other ongoing restructuring efforts: with the detracking movement, authentic assessment, site-based management, and so on. Restructuring means looking at not just what kind of classrooms we want, but what kind of world we want, and how we prepare children to be members of that broader community (p.11).

Inclusive education and the restructuring called for in the second wave of school reform have been shown to be in congruence with each on a number of factors. Just as second wave reform has shifted the focus of attention from the state to the school-site

level - the classroom - efforts to include exceptional students in the regular curriculum also focus on the classroom. A 1994 report prepared for the Broward County (Florida) School Board entitled How does Inclusion Fit With Reform identified major classroom issues in restructuring and inclusion. According to the report which examined how inclusion "fits" in with school reform, congruence between the two models was found for the following factors: 1) Both models emphasize teams of teachers working with students. 2) Both models emphasize the importance of cooperation and collaboration. 3) Both models focus on student outcomes. 4) Both focus on application of skills in real-world contexts. 5) Both models take into account student learning styles and individual abilities. 6) Both models are committed to continuous learning. The only incongruent factor dealt with the LRE of students; the restructured model assumed services to exceptional students might not be provided in the regular class, while the inclusive model assumed such services would be provided to exceptional students in their regular education classes. Obviously, the controversy that began in 1975 with the passage of PL 94-142 with its LRE principle, continues to vex current school reform as it attempts to define in practical terms who should be included in regular classes and who should not.

The current call for a third wave of school reform, reform that is systemic as well as coherent has taken hold in many educational quarters. With its emphasis on clear and inspiring goals for all students, this third wave would seem to be sympathetic to the movement of including exceptional students in regular classes. Although many states and localities have implemented educational reforms during the 1990's, in only a few of these locales has reform focused on the overall educational system, with explicit

inclusion of exceptional students (Lipsky & Gartner, 1997, p.225). While reform has targeted on the entire educational system in Kentucky and Kansas, inclusion is merely a component of restructuring efforts in Connecticut, Delaware, Florida, Hawaii, Illinois, Indiana, Massachusetts, Michigan, Minnesota, Ohio, Texas and Vermont.

Not only has special education reform been slow in implementation, it still remains on the back burner of many other reform proposals. Perhaps one of the most disquieting aspects of current reform efforts is their silence regarding exceptional students. In its report to the President and Congress, the National Council on Disability (1995) stated, "A review of eight major federal initiatives between 1990 and 1992 involving school-age children and youth shows that six did not include specific provisions for students with disabilities"(p.9). It would seem that in the push to increase the academic performance of all students, there is no clear consensus regarding what the term *all* actually implies. Not only have exceptional students been ignored in many state and federal initiatives, they have also been a low priority for the many professional associations attempting to develop national standards in their fields. According to a National Center for Educational Outcomes (NCEO) research associate, "most standards projects will have to go back and demonstrate how their standards include students with disabilities" (National Center for Educational Outcomes, 1994, p.3). In addition to lacks of concern in government initiatives and professional standards setting forums, data measuring the effect of reform efforts on the academic outcomes of exceptional students is inconsistent and in some cases, nonexistent. According to a 1993 NCEO report, exceptional students participated in assessments in only 44 states, with participation rates ranging from fewer than 10 percent in Colorado to more than 90 percent in

Kentucky. A 1994 report by the NCEO determined that only 19 states could identify the participation rates of exceptional students in their standardized statewide assessments. Approximately half of this country's exceptional students are also excluded from The National Assessment of Educational Progress (NAEP), the nations report card (Lipsky & Gartner, 1997). This sorry state of data driven affairs led Vanderwood, McGrew and Ysseldyke (1998) to conclude, "...it is not possible to extract, on a regular basis, nationally representative policy-relevant information on the educational and quality-of-life outcomes for students with disabilities" (p.366). Given the importance placed upon measurement-driven accountability and evaluation, hallmarks of many current reform attempts, the exclusion of exceptional students from such measures further illustrates the lack of clarity on the issue of "allness" that exists in such reforms.

### Current Inclusive Issues

Although there is no legal definition for the term inclusion or inclusive education, the National Center on Educational Restructuring and Inclusion (NCERI) developed the following working definition of inclusive education:

Providing to all students, including those with significant disabilities, equitable opportunities to receive educational services, with the needed supplementary aids and support services, in age-appropriate classrooms in their neighborhood schools, in order to prepare students for productive lives as full members of society (National Study, 1994).

From an institutional perspective, The Council for Exceptional Children (1995) has defined an inclusive school as being:



A diverse problem-solving organization with a common mission that emphasizes learning for all students. It employs and supports teachers and staff who are committed to working together to create and maintain a climate conducive to learning. The responsibility for all students is shared. An effective, inclusive school acknowledges that such a commitment requires administrative leadership, on-going technical assistance, and long-term professional development. Within inclusive schools, there is a shared responsibility for any problem or any success for students in the schools (p. vii).

From the initial impetus provided in 1975 by PL 94-142, through the mainstreaming efforts and REI debates of the 1980's, inclusion programs in the United States are increasing during the 1990's. According to McLesky, Henry and Hodges (1998) "Since the late 1980's, the number of students with disabilities who are educated in general education classrooms has increased consistently and substantially"(p.9). These findings are consistent with the results of a 1994-1995 study by NCERI that determined that inclusion programs were being conducted in all fifty states and that between 1994 and 1995 the number of school districts reporting inclusive programs had tripled (National Study, 1994, 1995). In addition to data indicating the increasing acceptance of inclusive programs for educating exceptional students, numerous organizations have taken policy stances on this issue. The Council for Exceptional Children (CEC) stated, "The CEC believes that the concept of inclusion is a meaningful goal to be pursued in our schools and communities" (Council for Exceptional Children, 1993). The Council of Administrators of Special Education (CASE) believed, "A unified system of education must prevail to ensure quality, inclusive education for all students" (1993, p.2). According to Lipsky and Gartner (1997) inclusion, to some degree or another, is also favored by numerous general education organizations such as the Association for Supervision and Curriculum Development (ASCD), the National Education Association

(NEA), and the American Federation of Teachers (AFT). Based on data reporting increasing acknowledgement and acceptance of inclusion as an effective means to educate all students and its growing popularity with regular education as well as special education organizations, it seems as if the promise of educational equality first promised by PL 94-142 may be finally close at hand.

Implicit in the calls for inclusive education is the notion of collaboration and cooperation between teams of professionals responsible for the education of all students in their classrooms. Such a partnership requires a shift of paradigm regarding the roles teachers play in the classroom, as well as the manner in which schools are structured. Numerous researchers (Graden & Bauer, 1992; Pugach, 1995; Villa & Thousand, 1995; York, Giangreco, Vandercook & Macdonald, 1992) have recognized collaboration among teachers, parents and other school personnel as a critical feature in the success of inclusion. Furthermore, some researchers (Sarason, 1990; Fullan, 1993) have argued that change initiatives must give attention to the perceived needs of the educators who must implement them. Teacher voice, or how teachers view themselves as both professionals and members of the larger school community, is a critical factor in understanding the conditions necessary to bring about this change of paradigm. A review of the literature regarding teacher perceptions on successful inclusion yields three major areas of concern to teachers as they include exceptional students into regular education classes: resources, both material as well as human, time and the structure/organization of schools.

Allocation of resources has been shown to be a critical factor in successful inclusion programs. According to Minke, Bear, Deemer and Griffin (1996) teachers

reported a need for money and space. Werts, Wolery, Snyder, Caldwell and Salisbury (1996) reported teachers called for additional material and physical resources, as well as additional human resources in their inclusive classrooms. O'Shea and O'Shea (1998) found teachers believed they needed more personnel to carry out added responsibilities and more materials to modify instruction. Downing, Eichinger and Williams (1997) reported similar findings of the need of teachers for additional support personnel in the classroom, as well as sufficient monetary support. These findings appear to indicate that in order for inclusive education to succeed in the public schools, additional resources need to be provided to support the process.

Time proved to be another factor influencing teacher perceptions of inclusion. Downing, Eichinger and Williams (1997) reported the need to team and find the time to team were important factors in the inclusionary process. In a study of 55 teachers, Myles and Simpson (1989) reported most teachers did not feel they had sufficient time for mainstreaming / inclusion. Similarly, Villa, Thousand, Meyers and Nevin (1996) reported that collaboration required time for teachers to meet and dialogue if inclusion was to succeed. Additionally, Minke, Bear, Deemer and Griffin (1996) reported teachers using a co-teaching model in their inclusive classes indicated collaboration and time were needed resources. Apparently, time constraints imposed by the traditional organization of schools has been perceived to be a barrier to successful inclusion.

The last major source of concern for teachers in inclusive classes, one that is intimately linked to resource and time factors, deals with the organization and structure of the schools in which they teach. Villa, Thousand, Meyers and Nevin (1996) reported successful collaboration required the restructuring of the school day, week, and year in

order to allow for more face-to-face problem solving and teaching activity. O'Shea and O'Shea (1998) found scheduling problems reduced teachers opportunities to provide appropriate educational experiences in inclusive classrooms. Bennett, Deluca and Bruns (1997) reported class size to be critical in implementing inclusion. Additionally, Chalmers and Faliede (1996) found the ability to preplan with colleagues, to develop communication systems among team members, to structure collaborative planning time were thought to be important factors in successful inclusion. Findings such as these suggest reorganizing the familiar structures in schools may be necessary to foster the collaborative culture needed implement inclusive education.

Bolman and Deal (1997) offer an elegant schema that may be used to describe and explain the mutually influencing affect these three factors have on the process of successful inclusion. The first explanation views people as the problem in implementing change. Teacher perception of themselves and their colleagues as skilled professionals will certainly affect the outcome of any inclusionary effort. The second explanation deals with the structure of the schools that teachers labor in. The manner in which a school is structured will impact on the ability of teachers to provide effective educational opportunities for all their students in inclusive classrooms. The third explanation concerns imbalances in power relationships in schools. The collaborative nature of inclusive education requires new conceptions of adult roles in the classroom as well as in governance procedures of the larger school community. Finally, the fourth explanation deals with the culture of the schools which teachers must contend with in their everyday school lives. Long-standing beliefs and values held by teachers need to

be examined in order to determine the positive or negative effect they may have on inclusion.

### Summary of Special Education Reform

The passage of PL 94-142 was a milestone in the effort to provide exceptional students with an education that was free, public and appropriate. This law and others that followed provided exceptional students with a wide array of educational services previously denied them in the public schools of the United States. These laws set the stage for further inclusion of exceptional students into regular classrooms not only by funding such attempts. They also provided substantive rights to exceptional students and provided the basis for further discourse regarding settings thought appropriate for meeting the educational needs of exceptional, as well as regular students.

As the necessary restructuring of schools proceeds and attempts at inclusive education become more accepted as means to increase the academic performance of all students, the artificial separation of special and regular education has come under increasing attack by many in the educational community. Proponents of inclusion view such a division of systems as a throwback to an obsolete paradigm that valued individual responsibility for student success over a more team oriented approach. The isolation of teachers in classrooms, working under dual systems of education is giving way to a more responsive and unified system. This new, more collaborative arrangement necessarily requires that the joys and frustrations of teachers be taken into account so that it may be successfully implemented. Attention should be paid to teacher perception

of factors such as school structure, resources, and time thought to be critical for the success of inclusive classrooms.

## CHAPTER III

### METHODOLOGY

Where is the understanding we have lost in knowledge? Where is the knowledge we have lost in information?

T.S. Eliot, 1934

The purpose of this study was to describe and explain the perspectives on inclusion of seven middle school teachers. The exploratory questions that guided the inquiry were: 1) What elements constituted these middle school teachers' perspectives on inclusion? And 2) What variables had an impact on these perspectives? The inquiry was qualitative in nature. Consequently, description focused on the continual and mutually influencing social situation that evolved as the participants and researcher interacted within the context of Malcolm X Middle School, thus creating a totally new situation. It was from this complex and dynamic "site" that participants constructed meanings that helped guide their actions, and from which the researcher collected rich and thickly described data. Interviews, observations and document and record analyses were the primary methods of data collection.

#### Qualitative Inquiry

The study used qualitative inquiry in an attempt to understand and explain the social dynamics of the situation, as well as the constellation of meanings and relationships that emerged from, and were related to the context within which they

existed. Rather than simply gathering demographic data, a more holistic approach was taken in order to understand the gestalt, the totality and the unifying nature of this particular setting (Miles & Huberman, 1994; Patton, 1980). This holistic process was inductive in nature, utilized multiple sources of data, such as interviews, observations and document analysis on any number of aspects of the setting. Qualitative researchers do not search out data or evidence to prove or disprove hypotheses they hold before entering the study. Rather, abstractions are built as the particulars that have been grounded in data come together. According to Bogden and Biklen (1992), “Theory developed this way emerges from the bottom up (rather than the top down), from many disparate pieces of collected evidence that are interconnected” (pp.32-33). Thus, data collected in this study was not be used to prove or disprove any a priori theory regarding the inclusion of exceptional students in regular education classes. Rather, data was used to give voice to the beliefs and concerns teachers had with the process of inclusion.

I attempted to make sense of the situation without imposing preexisting expectations on the setting. Rather, I strived to, “...allow the important dimensions to emerge from analyses of the situation under study *without presupposing in advance what those important dimensions will be*” (Patton, 1980, p.41, emphasis in the original). Qualitative inquirers prefer to let both the design of the study, as well as its guiding questions to emerge and unfold over time. Because qualitative researchers are committed to the concept of multiple and constructed realities, they find it incomprehensible to project those possibilities ahead of time. As a result, they believe, “...that design will emerge as they begin interaction with the setting and its denizens, but the unpredictable nature of those interactions prevents laying out schema for deciding or pursuing what is



interesting or important ahead of time” (Bogden & Biklen, 1992, p.142). Thus, I used qualitative techniques as they seemed to be appropriate for the purpose of the study, the description of teacher’s perspectives on inclusion. It was assumed each participant in the study had a unique perspective and point of view regarding the process of inclusion and that such perspectives could be influenced by the culture and organization of the school and may not have been stable over time. Therefore, it was especially unlikely an outside researcher could have identified these perspectives in advance.

Qualitative inquiry is well suited to the task of describing and explaining cultural phenomena because it allows the researcher to study situations in their naturally occurring complexity, and involves the studied commitment to actively enter the worlds of interacting individuals (Denzin, 1978). More importantly, qualitative inquiry is a discovery oriented approach which, “...minimizes investigator manipulation of the study setting and places no prior constraints on what the outcomes of the research will be” (Patton, 1990, p.41). An underlying assumption of qualitative inquiry is that theory should be grounded in the data; that no a priori theory could encompass the multiple constructions of reality that are likely to exist in any given social context (Glasser & Strauss, 1967). Therefore, theories regarding inclusion developed in this study came from data that gave meaning to how teachers themselves made sense of including exceptional students in regular classes, rather than my personal perspective of this inclusionary process.

Describing and making sense of the context within which social interactions occurred was of critical importance to the study. Qualitative researchers assume action can best be understood when it is observed in the setting in which it occurs.

Eisner (1991) highlights the importance of contextual knowledge when he admonishes:

So much of what is suggested to teachers is said independent of context and often by those ignorant of the practices they wish to improve. If qualitative inquiry in education is about anything, it is about trying to understand what teachers and children do in the settings in which they work (p.11).

The use of qualitative approaches seemed consistent with my desire to describe and explain the impact a schools organization and culture had upon the thoughts and actions of its members. This study focused in part, on how the structure, norms and customs of a school impacted upon the everyday school lives of staff members. According to Spradley (1979), qualitative inquiry, "...is the work of describing a culture. The essential core of this activity aims to understand another way of life from the native point of view" (p.86). For the purposes of this study, culture was defined as, "the acquired knowledge that people use to interpret experience and to generate behavior" (Spradley, 1980, p.2). Such cultural knowledge is used by members of a culture to make sense of their everyday life, as well as how to respond to novel situations. It is this sense-making process that allows them to get along successfully in life. Both uses of culture, to interpret experience and to generate behavior, occur together in actual situations. We are constantly making interpretations and using them to guide our actions (Spradley, 1980). This study assumed the culture and organization of a school both had a powerful influence on the nurturing of successful inclusionary practices. As each individual school possesses a culture unique unto itself, a qualitative approach seemed to be the appropriate method of determining precisely what cultural and organizational aspects of Malcolm X Middle fostered such inclusive practices.

The qualitative approach used in this study was facilitated in part, by the use of “thick” description. Originally discussed by Gilbert Ryle, thick description, or the elaborate and detailed description of an event, assumes the researcher must get below the surface of events to the most enigmatic aspect of the human condition: the construction of meaning (Geertz, 1973). The use of thick description allowed me to share in the meanings that evolved in the setting, meanings taken for granted by the participants. Such elaborate description facilitated my portrayal of these new understandings for the reader and other outsiders. Detailed accounts of the everyday school lives of the participants allowed me to more fully describe and explain their perspectives on inclusion. In a qualitative study of high school principals, Wolcott (1973) said:

The test of ethnography is whether it enables one to anticipate and interpret what goes on in a society or social group as appropriately as one of its members. To the extent that the account provided here achieved this objective, the reader should feel that if he were suddenly to find himself in an encounter with staff members, pupils, or parents at the school described, or if he were to attend a meeting with other principals in the school district, he would understand how he might act if he were in the role of principal. (p.xi)

Another assumption of this study was the notion of teachers as thoughtful, reflective, professionals who not only must constantly evaluate the meaning-making processes that evolve inside their classrooms. They must also make sense out of, and negotiate with, the influence of the larger school culture. Unlike the rational-technical, natural science approach which focuses on prediction of social phenomena through use of researcher imposed variables and theories (Reason, 1996), the qualitative focus of this study was descriptive and evolutionary in nature. Its aim was to thickly describe and explain the everyday lives of teachers as they attempted to include all students in the

regular curriculum of their school. This elaborate description of lived experiences allowed the situation to be viewed through multiple “lenses”, or points-of-view. Not only was the situation perceived through my own personal lens; it also included the lens through which the participants viewed the experience as well. The observed actions and recorded thoughts of the participants served as a rich source of data from which meanings were drawn and theories developed, not from my personal point of view, but from the actual voices of the participants themselves. Such a design,”...serves as the foundation for the understanding of the participants’ worlds and the meaning of shared experience between the researcher and participants in a given social context (Janesick, 1994, p.210). This use of highly detailed data, or the thick description given by teachers of their everyday school lives, fit well with the one of the purposes of this study; that of which variables had an impact on teachers perspectives on inclusion. This elaborate description of the norms, values and beliefs held by faculty members of this middle school, in their own words, helped determine exactly which aspects of the schools organization and culture impacted on their ability to include exceptional students in regular education classrooms.

The design and implementation of qualitative research is ultimately based on the ontological, epistemological, and methodological assumptions of the interpretive paradigm of social scientific thought (Skrtic, 1985). According to Lincoln and Guba (1985) these assumptions include the following:

1. There are multiple constructed realities that can be studied only holistically; inquiry into these multiple realities will inevitably diverge so that prediction and control are unlikely outcomes, although some level of understanding (*verstehen*) can be achieved.

2. The “inquirer” and the “object” of inquiry interact to influence one another; knower and known are inseparable.
3. The aim of inquiry is to develop an idiographic body of knowledge in the form of “working hypotheses” that describe the individual case.
4. All entities are in a state of mutual simultaneous shaping so that it is impossible to distinguish causes from effects.
5. Inquiry is value-bound by: (a) inquirer values, (b) choice of paradigm, (c) substantive theory, (d) contextual values, and (e) congruence or non-congruence among values inherent in problem, paradigm, theory, and context. (pp.37-38)

These assumptions directly conflict with those of the prevailing rational-technical paradigm of scientific inquiry. The widely accepted epistemology of Western science assumes a nomothetic science, or a world within which everything obeys inviolable scientific laws, can ultimately describe the world. It is further assumed that such a science, “... is adequate for the purposes to which it is put, namely to guide the political, social, and economic decisions whose outcomes may affect people around the globe for generations to come” (Harman, 1996, p.33). In contrast to an almost universal acceptance of this dominant paradigm, that of prediction and control focused science, other voices contend “...that kind of science is useful for prediction, control, and the design of manipulative technologies. But that science is in no way qualified to provide a world view adequate to guide individual and societal decisions” (Harman, 1996, p.31). This study assumed the participants played an important role within the meaning-making process of the school, that they had a point of view and capacity for self-evaluation. Thus, the multiple everyday realities of these seven middle school teachers made it unlikely that any one perspective on inclusion would emerge as an all- encompassing, explanatory theory. Furthermore, I found it impossible to completely distance myself

from the situation at hand. To do so would have required that I deny my past experience as an exceptional educator, as well as that of a self-reflective professional. This resulted in a researcher-participant interaction that was at the same time, inseparable and mutually influencing. This interaction was meant to facilitate the development of working hypotheses regarding the process of inclusion at Malcolm X Middle, rather than hypotheses that served to prove or disprove the validity of inclusion in general.

According to Schwandt (1996), "...we have come to equate being rational in social science with being procedural and criteriological.... We believe that it is method, and method alone that produces findings. Method has become a sacred prescription" (p.60). Combining the term's method and idolatry, Janesick (1994) referred to this slavish attachment to method as "methodolatry". She cautioned, "It is always tempting to become over-involved with method and, in doing so, separate experience from knowing" (p. 215). In a discussion of the epistemological basis of the study of complex, evolutionary social interactions, Harman (1996) proposed the following as characteristics of an alternative constructivist paradigm:

1. Epistemology will be "radically empirical" in that it will be experiential in the broad sense (subjective experience will be used as primary data rather than being limited to physical-sense data). It will address the totality of human experience (no reported phenomena will be written off because they violate "known" scientific laws). The study of consciousness involves an interaction between observer and observed.
2. It will aim at being objective in the sense of being open and free from hidden bias while dealing with both the "external" and "internal" experience as origins of data.
3. It will insist on *open inquiry* and *public (intersubjective) validation* of knowledge. It will recognize that these goals may be met only incompletely, particularly when seeking knowledge of inner experience.

4. It will place *emphasis on the unity of experience*. It will thus be congenial to a holistic view in which the parts are understood through the whole. It will recognize the importance of cultural and subjective meanings in all human experience. The meanings of all experiences will be understood by discovering their interconnections with other meaningful experiences.
5. It recognizes that science deals with *models and metaphors representing certain aspects of experienced reality* and that any model or metaphor may be permissible if it is useful in helping to order knowledge.
6. It will thus recognize *the partial nature of scientific concepts of causality*. It will implicitly question the assumption that a nomothetic—one characterized by inviolable laws—can in the end deal adequately with causality.
7. It will be participatory in recognizing that understanding comes from not being detached, objective, analytical, and coldly clinical alone but also from cooperating with, or identifying with the observed and experiencing it subjectively.
8. It will involve recognition of the inescapable role of *the personal characteristics of the observer*. To be a competent observer the researcher must be *willing to risk being profoundly changed* through the process.
9. Due to the potential transformation of observers, an epistemology that is accepted now may in time have to be replaced by another.

While such metatheoretical assumptions represent the axiological grounding of qualitative research, axioms alone cannot insure a competent design, nor that an inquiry will be successful in explaining or describing a complex social situation.

### Purposive Sampling

A mixture of two of Patton's (1990) purposive sampling techniques was used in the study to select the site and the participants, convenience sampling and extreme

sampling. Purposeful sampling may be defined as “a strategy in which particular settings, persons, or events are selected deliberately in order to provide important information that can’t be gotten as well from other choices” (Maxwell, 1996, p.70).

Convenience sampling was used in the sense that I had been a classroom teacher at, and continue to work as a support person in, Malcolm X Middle and thus had prior knowledge of the school and its staff. This prior knowledge helped facilitate my gaining entrée to the site and helped me to establish and maintain a good rapport with the participants. Extreme sampling was used in that Malcolm X Middle had been undergoing efforts to restructure the ways in which teachers instructed students and organized their everyday school lives. Thus, I believed Malcolm X Middle would be a rich source of data from which theories could be constructed and participant perspectives described and explained.

While convenience sampling may have lessened the credibility of the study, Light et al. (1990) state that “With only a limited number of sites, consider *purposeful selection* rather than relying on the idiosyncrasies of chance” (p.53). Marshall and Rossman (1995) argue:

The ideal site is where, 1.) Entry is possible. 2.) There is a high probability that a rich mix of the processes, people, programs, interactions, and structures of interest are present. 3.) The researcher is likely to be able to build trusting relations with the participants in the study. And 4.) Data quality and credibility of the study are reasonably assured. (p.51)

Initially, the study focused on four middle school teachers. As the study progressed, interviews with, and observations of these four teachers led me to other, connected and important participants. Such a sampling technique is described by Miles



and Huberman (1994), "Samples in qualitative studies are usually not wholly prespecified, but can evolve once fieldwork begins. Initial choices of informants lead you to different and similar ones.... This is conceptually driven sequential sampling" (p.27). This technique seems to agree with the notion in qualitative research of the inability of the researcher to determine in advance who the important participants in the study will be. Thus, I found it impossible to determine at the outset of the study precisely what other staff members these four teachers might have considered influential in their desire to include special education students in regular education classes.

### The Role of the Researcher

Many writers (Eisner, 1991; Janesick, 1994; Marshall and Rossman, 1995) have described the fact that the qualitative researcher is the research instrument; their presence in the lives of the participants invited to be part of the study is fundamental to the paradigm. This study was no different. Janesick (1994) uses the metaphor of dance to describe the role of the researcher in qualitative studies, as both dance and research design are thought to be about the lived experiences of people. According to Janesick, "...the qualitative researcher is very much like an artist at various stages in the design process, in terms of situating and recontextualizing the research project within the shared experience of the researcher and the participants in the study" (1994, p.210). It is the presence of the researcher in the lives of the participants, as well as the interpretation of mutually shaping, shared experiences brought about by the interactions of the researcher and participants, that allow qualitative researchers to pose both initial and subsequent

questions that guide the study. Rather than attempting to enter the situation as the “learned outsider” who had come to identify weaknesses and prescribe solutions to these problems, I attempted to simply describe and explain the social situation at hand. Berg (1995) cautions, “When entering a natural setting...if you strike the wrong attitude, you might well destroy the possibility of ever learning about the observed participants and their perceptions” (p.91). On a similar note Matza (1969) identifies researcher attitude as a crucial element in field studies stating, “one must enter *appreciating* situations rather than intending to *correct* them.” I assumed the participants in the study had knowledge of the setting and culture, both tacit and explicit, that I may have lacked. This participant knowledge was assumed to be equally important and powerful as any knowledge that I might have brought to the situation. Furthermore, I assumed the knowledge brought with me from previous life experiences might itself be shaped by the inquiry.

I brought to the inquiry eight years of experience as an exceptional education teacher. During that time I had taught students with various special education labels: Emotionally Handicapped (EH), Severely Emotionally Handicapped (SEH), Educable Mentally Handicapped (EMH), and Specific Learning Disabled (SLD). I had been an exceptional educator at Malcolm X Middle for six of those eight years and was its' Special Education Department Chair for two years. This last position introduced me to numerous forums that dealt with issues of school reform and restructuring.

In the spring of 1995 I conducted a pilot study at Malcolm X Middle School for a doctoral research class entitled Effect of Student Team Learning on the Mathematics Computational Skills of Self-Contained Middle-Grade Educable Mentally Handicapped Students. The purpose of the study was to investigate the effectiveness of Student

Teams-Achievement Divisions, a cooperatively based mathematics program, as a means to include a group of fifteen EMH students in a seventh-grade regular education classroom. Results indicated that this group of included students scored significantly higher on the math computation sub-test of the Woodcock-Johnson Tests of Achievement than did their self-contained peers. This inclusive class was co-taught by a regular education teacher and myself. Co-teaching implies equal positions of power and accountability for both teachers, each being responsible for the education of the entire class. The results for the students were generally positive; grades were acceptable and behavior was improved. However the greatest change occurred in the perceptions on inclusion held by both teachers. At the outset we were both apprehensive. I felt unsure about my knowledge of the subject matter, and the regular educator felt nervous about dealing with exceptional students. By the end of the experience, we were enthusiastic supporters of both co-teaching and including exceptional students in the regular curriculum. It seemed as if this mutually satisfying experience had caused the gap between exceptional and regular education to begin narrowing. Perhaps exceptional students at Malcolm X Middle might indeed be on the verge of "breaking out" of the self-contained classrooms to which they had been exiled.

My current position as a Behavior Support Teacher has me working with exceptional students at three different schools: two middle schools, Malcolm X Middle included, and a high school. As such, I am not a faculty member at any of these schools. Rather, I am an additional support person provided to them by the District. Although my being a former faculty member at Malcolm X Middle would seem not to allow me to conform to the credo, "the less familiar you are with a social situation, the more you are

able to see the tacit cultural rules at work” (Spradley, 1980, p.62), my current professional assignment has removed me from the everyday affairs and internal politics of this group. While this former group affiliation may be viewed as a potential source of bias, there are some qualitative researchers that view such experiential data as a major source of insights, hypotheses, and validity checks (Maxwell, 1996). Commenting upon such life experiences, Strauss (1987) argues:

These experiential data should not be ignored because of the usual canons governing research (which regard personal experience and data as likely to bias the research), for these canons lead to the squashing of valuable experiential data. We say, rather, “mine your experience, there is potential gold there!” (p.11)

In sum, these experiences were potential sources of bias for the study. However, according to Bogdan and Biklen (1992) qualitative research provides means to ease the effects of such researcher bias: 1) Qualitative studies are not impressionistic, the researcher spends considerable time in the empirical world laboriously collecting and reviewing piles of data. 2) The data provide a much more detailed rendering of events that even the most creatively prejudiced mind might have imagined prior to the study. 3) Qualitative researchers tend to believe that situations are complex, so they attempt to portray many dimensions rather than to narrow the field. And 4) Qualitative researchers guard against bias by recording detailed field notes, which may be critiqued by an uninvolved colleague as an additional check on bias (p.46). This study lasted for six months. I felt this would be a sufficient amount of time to collect and analyze a large amount of thickly described and detailed data. The focus of the study was evolutionary in nature, with the lived experiences of the participants driving its’ direction. In addition,

this rich and descriptive data was critiqued by a disinterested outside reader. In such a manner, I felt that potential sources of bias in the study would be minimized.

During the course of the study I found that my role as both a teacher and as a researcher were profoundly affected by the experience. I began the study holding a perspective that had been molded by years of teaching exceptional students in self-contained classrooms. During all those years I had always felt somehow separated from the rest of the classes in the schools in which I had taught. Regular teachers had always been quick to comment on how much patience I must have to teach "those" students. For my students, the battle to gain access to regular classes was constant. It seemed as if we had something in common--our both being branded as "special." My everyday life as a teacher was one of preparing my students for eventual reentry into this "other", more normal world. Paradoxically, it seemed as if the more schools attempted to prepare exceptional students for life in the mainstream, the further schools separated these same students from the everyday school life most other students experienced.

This solitary perspective began to shift as the study progressed. Observations in regular education classes at Malcolm X made me realize that exceptional and regular educators have more in common with each other than perhaps we had originally suspected. Both settings seemed to face similar problems, unmotivated students with poor academic and social / behavioral skills. As our conversation continued, I found myself empathizing with their concerns about the lack of success many of their students were experiencing. I also began to appreciate some of the unique challenges faced by regular teachers at Malcolm X Middle. The impact of having such large numbers of ill-prepared students to deal with everyday was quite telling. So, while I still felt the gap

between regular and exceptional education remained as wide as ever, the ability to begin building bridges between the two groups seemed to have been enhanced by the close mutually reinforcing relationship that developed between the participants and myself.

The evolutionary, ever changing nature of the study had a profound effect on my understandings of the change process in general and inclusion in particular. My perception of the issues involved in including exceptional students in regular classes at Malcolm X Middle was itself modified by the conversations I had with my regular education colleagues. As I became more aware of the concerns and recommendations they held on the topic, it became clear that some of my most deeply held convictions on inclusion made little sense in the everyday school lives of the participants.

Personally, this shift in perception served as a source of inspiration rather than an admission of misunderstanding. I found as the study progressed, it became increasingly more difficult to distance myself from the process that was evolving all around me. To deny that my own life experiences brought nothing to the situation at hand seemed an impossible task. Rather than being a source of bias, my interacting with the participants on an equal level served to bring forth an exchange of information that allowed me to more fully describe and explain the present condition of inclusion at Malcolm X Middle. The power of conversation and collaboration among colleagues to identify and bring clarity to issues facing schools was impressive indeed.

## Data Collection and Recording

The study utilized three forms of data collection: teacher interviews, classroom observations, and document analysis. The documents reviewed in this study were obtained from the following sources: 1) Federal Government. 2) State of Florida. 3) Broward County. These documents will be addressed in detail in Chapter Four. Tape recordings, transcripts of interviews and hand-written field notes were the methods used to record the data. While each of these methods provided unique information, the use of three multiple forms of data allowed for its triangulation. Research suggests that triangulation of data is indeed an important component of descriptive validity (Janesick, 1994; Merriam, 1988).

### Interviews

The purpose of the interviews was to assist the researcher in describing and explaining the perspectives on inclusion held by seven teachers at Malcolm X Middle School. The initial interviews were unstructured and consisted of open-ended, “grand tour”, or overview questions (Spradley, 1980). These initial questions led the researcher to “mini-tour”, or more detailed and exploratory types of questions (Jorgenson, 1989). This process enabled the participants to reflect upon their lived experiences at school as they attempted to include exceptional students in the schools regular curriculum. This personal reflection upon experience assisted my understanding of the perceptions,

feelings, and knowledge of the participants in their own terms, rather than any I might have imposed upon them. According to Seidman (1991):

Interviewing provides access to the context of people's behavior and thereby provides a way for researchers to understand the meaning of that behavior. A basic assumption in in-depth interviewing research is that the meaning people make of their experience affects the way they carry out that experience....the primary way a researcher can investigate an educational organization, institution, or process is through the experience of the individual people, the "others" who make up the organization or carry out the process (p.4).

Likewise, Kvale (1996) states, "An interview is a conversation that has structure and purpose. It goes beyond the spontaneous exchange of views as in everyday conversation, and becomes a careful questioning and listening approach with the purpose of obtaining thoroughly tested knowledge" (p.6).

I viewed interviewing as constructive conversation. In opposition to taking a positivist approach in which knowledge is based solely on objective, quantifiable data, with the prediction and control of the behavior of others as an ultimate goal, I took a more postmodern approach to knowledge generation. In such an alternative conceptualization of reality interviews would, "...emphasize the constructive nature of knowledge created through the interaction of partners in the interview conversation" (Kvale, 1996, p.11).

### Observations

Observations were made of participant interactions as they led their everyday school lives. These observations were made during regularly scheduled team meetings



and during instruction in classrooms. Marshall and Rossman (1995) describe observation as "...the systematic noting and recording of events, behaviors, and artifacts in the social setting chosen for study.... Through observation, the researcher learns about behaviors and meanings attached to those behaviors" (p.80). The authors validate the importance of observation as a fundamental method to be used in qualitative research. They further argue that observation helps to discover complex interaction in natural settings.

### Document Analysis

An analysis of pertinent documents was made including Federal, State and District policy papers, letters and memos disseminated within the District, minutes from meetings and documents associated with Malcolm X Middle. Patton (1990) reminds us, "one particularly rich source of information about many programs is program records and documents.... In contemporary society all programs leave a trail of paper that the evaluator can follow and use to increase knowledge and understanding about the program" (p.233). Marshall and Rossman (1995) confirm the importance of document review as they argue, "Researchers supplement participant observation, interviewing, and observation with the gathering and analyzing of documents produced in the course of everyday events. As such, this review is an unobtrusive method, one rich in portraying the values and beliefs of the participants" (p.85).

## Data Analysis

Data collection and analysis occurred in an integrated and cyclical process in which the analysis of each interview, observation, and document provided direction for succeeding research efforts. Analysis of data occurred from the outset of the study allowing the researcher to identify emergent categories, themes, and patterns. Miles and Huberman (1994) strongly recommend such early analysis of data. They indicate that the early analysis of data helps the researcher cycle back and forth between data collection and the generation of new strategies for continuous data collection. Similarly, Merriam (1988) also supports analysis during data collection by stating, “Without ongoing analysis, the data can be unfocused, repetitious, and overwhelming in the sheer volume of material that needs to be processed. Data that have been analyzed while being collected are both parsimonious and illuminating” (p.162).

Data collection and analysis went hand in hand in order to promote the emergence of substantive theory, grounded in empirical data. Such grounded theory proved to be extremely useful in describing and explaining the salient factors of successful inclusionary practices. While much educational research has focused on theory testing, it has been hampered by the fact that educational theory is anemic and has seldom led researchers to interesting questions or verifiable findings (Hutchinson, 1988). There exists a need for data based theory in education that might help explain the everyday world of teachers and students. According to Hutchinson:

Grounded theory offers a systematic method by which to study the richness and diversity of human experience and to generate relevant, plausible theory, which can be used to understand the contextual reality of social

behavior. With such understanding, educators can assess what is happening in the groups studied and plan interventions to improve the quality of education (p.127).

Grounded theory is a general methodology for developing theory that is grounded in the data collected. Theory evolves during actual research and it does this through the continuous interplay between analysis and data collection (Strauss & Corbin, 1994). I used the constant comparative method, originally conceptualized by Glaser and Strauss (1967) to process data for analysis. The intent of this process was to compare every piece of datum to every other datum. In such a way, salient themes, recurring ideas or language, and patterns of beliefs that linked people together were identified and explanatory theories generated. This process of category generation involved noting regularities in the setting or in the narratives of the participants. It also allowed me to identify points of tension and conflict, or irregularities in these narratives. According to Janesick (1994), "In classic terms, sociologists and anthropologists have shown us that finding categories and the relationships and patterns between and among categories leads to completeness in the narrative" (p.215).

Each phase of data analysis involved data reduction so that the amount of collected data could be turned into manageable chunks. According to Miles and Huberman (1994), "Data reduction is a form of analysis that sharpens, sorts, focuses, discards and organizes data in such a way that "final" conclusions can be drawn and verified" (p.11). This data reduction was accomplished by use of the following means: 1) Contact summary sheets, which were single sheets containing focusing or summarizing questions about a particular field contact; 2) Codes, which were tags or labels for assigning units of meaning to "chunks" (words, phrases, sentences, paragraphs) of data so

that the information could be retrieved and organized in an orderly fashion and 3) Memos, which were theorizing ideas about codes that were written up as the coding took place that served to tie different pieces of data into a recognizable cluster (Miles & Huberman, 1994). Table 1 provides a list of these categories, codes and themes.

### Evaluation of the Study

The major factor in establishing the credibility of interpretive inquiry is technical rigor in analysis (Patton, 1990). Unlike the rational-technical insistence on the use of measures of validity, reliability, and generalization as benchmarks of technical rigor, qualitative research looks to the degree to which it's findings are credible, transferable, dependable, and confirmable (Lincoln & Guba, 1989).

Rather than subscribing to the narrow, positivist approach in which validity came to mean whether a method measures what it is intended to measure, qualitative research views validity in a broader sense. It is clear that internal validity, which is nothing more than an assessment of the degree of isomorphism between a study's findings and the "real" world, cannot have meaning as a criterion in a paradigm that rejects a realist ontology (Lincoln & Guba, 1989).

Table 1

List of Categories and Codes

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<p><b>A. <u>Setting / Context</u> (SC)</b>          Time (SC-Time)          Class Size (SC-CLSZ)          Resources (SC-R)              Materials (SC-RMAT)              Funding (SC-RFND)              Human (SC-RHUM)          Culture (SC-CULT)          Collaboration / (SC-COLB)              Collegiality          Departmental Gap (SC-GAP)</p> <p><b>B. <u>Definition of Situation</u> (DF)</b>          Federal (DF-FED)          State (DF-ST)          District (DF-DIST)          School (DF-SCL)          Teacher (DF-TCH)              Professionalism (DF-TPRO)              Regular Educator (DF-TREG)              Exceptional Educator (DF-EXP)</p> <p><b>C. <u>Perspectives</u> (PS)</b>          Federal (PS-FD)          State (PS-ST)          District (PS-DIST)          Teacher (PS-TCH)              Organization (PS-TORG)              Culture (PS-TCUL)              Structure (PS-TSTC)</p> <p><b>D. <u>Process</u> (PR)</b>          Federal (PR-FED)              LRE (PR-FLRE)              IEP (PR-FIEP)          State (PR-ST)              LRE (PR-SLRE)              IEP (PR-SIEP)              Standards (PR-SSTD)          District (PR-DIST)              LRE (PR-DLRE)</p>	<p><b>E. <u>Events</u> (EV)</b>          Meetings (EV-MTG)              Grade-Level (EV-MGDL)              Team (EV-MTEM)              Department (EV-MDPT)              Faculty (EV-MFAC)              IEP (EV-MIEP)          CMS (EV-CMS)              Training (EV-CTRG)              Planning (EV-CPLN)              Collegiality (EV-CCOL)              Pro (EV-PRO)              Con (EV-CON)          Tests (EV-TST)              Standardized (EV-TSTD)          Block Scheduling (EV-BLK)              Benefits (EV-BBEN)              Pro (EV-BPRO)              Con (EV-BCON)</p> <p><b>F. <u>Strategies</u> (ST)</b>          Instruction (ST-IN)              Coop.Learning (ST-COOP)              Peer Tutoring (ST-PEER)              Chunking (ST-CHKG)              Lecture (ST-LECT)              Bookwork (ST-BKWK)              Manipulatives (ST-MANP)              Comm-Based Inst. (ST-CBI)          Behavior (ST-BHV)              Behavior System (ST-BSYS)              Time-Out (ST-BOUT)              Office Referrals (ST-BREF)              Suspensions (ST-BSUS)          Inclusion (ST-INC)              Benefits (ST-IBEN)              Co-Teaching (ST-ICOT)              Consultation (ST-ICON)              Solitary Teacher (ST-ISOL)              Pro (ST-IPRO)              Con (ST-ICON)</p>
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## G. Themes / Categories

### Teaching and Learning

Similar instructional strategies used in ESE and regular classes.

Need for adequate resources.

Regular Educators-have inadequate materials.

Exceptional Educators- have adequate materials.

Difference in type of additional human support.

Regular Educators-solitary teacher, do not believe in joint responsibility.

Exceptional Educators-team-oriented approach, joint responsibility.

### School Structure

#### Block Scheduling

Regular and Exceptional educators agree on effectiveness.

Adequate time.

Facilitates implementation of alternative instructional strategies.

Creates sense of intimacy with students.

May be a behavioral tool.

#### Comprehensive Management System Advantages

Adequate planning time.

Allows for all meetings during normal school day.

Superior In-service delivery.

Increase in collaboration and collegiality.

Creates favorable atmosphere for inclusion.

#### Comprehensive Management System Disadvantages

Not initiated by school (top-down).

Not aligned with traditional teacher evaluation process

### School Climate and Culture

#### Effect on Inclusion

Regular Educators- School ready for inclusion in small amounts.

Exceptional Educators- School ready for inclusion, but not on priority list.

#### Communication Gap between Regular and Exceptional Education

Belief that exceptional teachers have special skills.

Historical division- school always separated exceptional students.

Use of outmoded mainstreaming model of inclusion.

#### Behavior an issue for all participants.

School-wide issue-does not affect inclusion

Class-issue- does affect inclusion, proof of behavioral readiness.

In such a broader concept, validity pertains to whether a method investigates what it is intended to investigate. Anthropologists Pertti and Gretel Pelto (1978) argue validity refers to the degree to which scientific observations actually measure or record what they purport to measure. In addition, Janesick (1994) describes the fact that, “validity in qualitative research has to do with description and explanation, and whether or not a given explanation fits a given description. In other words, is the explanation credible?” (p.216). Wolcott (1990) comments on the confusion caused by the reassignment of the term validity from one domain to another, “Perhaps someone will find or coin qualitative research’s appropriate equivalent for “validity”, we have no esoteric term now. For the present, *understanding* seems to encapsulate the idea as well as any other everyday term” (p.146).

Notwithstanding the confusion caused by the multiplicity of definitions, it can be argued that the descriptive nature of qualitative research is actually a source of increased validity. LeCompte and Goetz (1982) provide four reasons for validity strength in qualitative research: 1) In many cases the researcher lives among those to be studied or if not living with them, spends a significant amount of time with them; 2) Interviews conducted are designed to be more in line with the empirical categories that have some meaning for the informants; 3) Observations and interviews are carried out in naturalistic settings, which reduce the problems associated with studying in artificial environments. And 4) The researcher usually engages in self-monitoring or self-questioning and as a consequence is far more likely to accurately report what is actually occurring.

In terms of reliability, qualitative researchers concern themselves with the accuracy and comprehensiveness of their data. They tend to view reliability as a fit

between what they record as data and what actually occurs in the setting under study, rather than literal consistency across different observations (Bogden & Biklen, 1992). The reliability criterion for qualitative research focuses on identifying and documenting recurrent, accurate, and consistent or inconsistent features as patterns, themes, and categories. Rather than viewing reliability in terms of the replicability of an inquiry, Eisner (1991) asks the reader to view reliability in terms of its referential adequacy. The qualitative emphasis on elaborate description of both the context and the construction of meanings made by the participants allows the researcher to achieve such referential adequacy. Rather than collecting data from a sample thought to be representative of some larger population, data stripped of context and statistically aggregated, qualitative data is comprehensive and intimately linked to the situation under study. According to Eisner (1991):

Criticism is referentially adequate to the extent a reader is able to locate in its subject matter the qualities the critic addresses and the meanings he or she ascribes to them. In this sense criticism is utterly empirical; its referential adequacy is tested not in abstractions removed from qualities, but in the perception and interpretation of the qualities themselves. (p.114)

Qualitative research concerns itself not with the question of whether findings are generalizable, but rather with the question of to which other settings and subjects they are generalizable (Bogden & Biklen, 1992). It is assumed that the rich descriptive data of a qualitative study will allow other researchers to determine if its outcomes are indeed generalizable to a new and different context. According to Eisner (1991), “...generalizations derived from research are not to be taken as gospel...there are no seven sacred steps to effective teaching. We offer considerations to be shared and



discussed, reflected upon, and debated” (pp.204-205). In this qualitative study the positivist notion of generalizability has little meaning, as the “realities” of both setting and perspective one might wish to generalize were constructed in different forms in the minds of the participants, as well as the researcher. Rather, I took the advice of Cronbach (1975) regarding generalizability:

Instead of making generalization the ruling consideration in our research, I suggest we reverse our priorities. An observer collecting data in a particular situation is in a position to appraise a practice or proposition in that setting, observing effects in context. In trying to describe and account for what happened, he will give attention to whatever variables were controlled, but he will give equally careful attention to uncontrolled conditions, to personal characteristics, and to events that occurred during treatment and measurement. As he goes from situation to situation, his first task is to describe and interpret the effect anew in each locale, perhaps taking into account factors unique to that locale....When we give proper weight to local conditions, any generalization is a working hypothesis, not a conclusion (pp.124-125).

In an attempt to define rigor criteria that are more appropriate to the constructivist paradigm, Lincoln and Guba (1989) suggest the following, which parallel the traditional four positivist constructs:

1. Credibility, a criterion parallel to internal validity, which focuses on establishing a match between the constructed realities of the respondents and those realities as represented by the researcher. Techniques to ensure the veracity of this match include: a) prolonged engagement in the setting; b) persistent observation to add depth of description; c) debriefing with a disinterested peer to “test out” findings; d) negative case analysis, the process of revising working hypotheses; e) progressive subjectivity, or the process of monitoring the researcher’s own developing construction so that it doesn’t take precedence over any other participant’s construction; and f) member checks with all participants of the study.
2. Transferability, a criterion parallel to generalizability. It is the empirical process for checking the similarity between sending and receiving contexts in which the burden of proof of the claimed generalizability is on the *inquirer*, while the burden of proof for the

claimed transferability is on the *receiver*. The major technique for establishing the degree of transferability is thick description.

3. Dependability, a criterion parallel to reliability. It is the tracking of methodological changes and shifts in construction—the hallmarks of a maturing and successful inquiry. This is accomplished through the use of dependability audit.
4. Confirmability, a criterion parallel to objectivity. It is concerned with assuring that data, interpretations, and outcomes of the inquiries are rooted in contexts and persons apart from the researcher and are not figments of his imagination. It is not rooted in method. Rather, it is rooted in the data itself, so that constructions can be traced back to their sources and the logic used to assemble interpretations is both explicit and implicit in the narrative of the case study. (pp.236-243)

I have maintained all the materials necessary to construct an audit trail including the following: official documents and papers, transcripts of recorded interviews, and notes and graphic organizers used in generating categories, interpretations, and conclusions. Finally, an outside reader, one who has no stake in the outcomes of the study, was utilized to establish the descriptive validity of the study. In such a manner, the emerging insights and interpretation of the narratives were critiqued in order to guard against researcher bias.

### Summary

The purpose of this study was describe and explain the perspectives on inclusion of seven middle schoolteachers. The exploratory questions that guided the study were:

1) What elements constituted these teachers' perceptions on inclusion? And 2) What variables had an impact on these perspectives?

The inquiry was qualitative in nature. This implies the initial exploratory questions that were constructed and framed, led to other reconstructed and connected

questions over the life of the study. This reconstruction was shaped by my lived experiences with the participants, as well as the context in which the study took place. Although qualitative research is ideologically driven, there is no value-free or bias-free design, early identification of biases will allow the reader to easily see where the questions that guide the study are crafted (Janesick, 1994). The thick description used in the narrative allowed the study to be told in the words of the participants themselves, rather than those of an “outside” researcher. Such rich description also allowed the participants to give meaning to the actions that guided their everyday school lives.

A holistic and inductive approach toward design and data gathering was used to make sense of the multiple realities and the mutually shaping researcher / participant experiences that existed within the context of the study. No attempt was made to prove or disprove any predetermined hypotheses. Rather, theory generation was grounded in the data; abstractions were built as the particulars from the data emerged and came together. I attempted to make sense of the situation without imposing preexisting expectations on the setting. Just as its critical questions emerged and unfolded over time, so did its design. Qualitative research is not interested in predicting or controlling behavior. Rather, it is concerned with matters of meaning (Eisner, 1991). Multiple sources of data, such as interviews, observations, and document analysis were used to describe and make sense of both the situation and the setting. This triangulation of multiple sources of data allows researchers to, “obtain a better, more substantive picture of reality; a richer, more complete array of symbols and theoretical concepts; and a means of verifying many of these elements (Berg, 1995, p.5). Data analysis went hand in hand with data collection to promote the emergence of substantive theory grounded in

empirical data. Such data based theory was thought be useful to explain the everyday world of teachers and students.

Rather than using the rational-technical terms of validity, reliability, generalization, and objectivity to establish the technical rigor of the study, I employed rigor criteria that parallel these constructs, and were thought to be more appropriate to a constructivist worldview. Credibility, a criterion parallel to validity, focused on establishing a match between the constructed realities of the participants and those realities as represented by the researcher. Transferability, a criterion parallel to generalizability, focused on the empirical process for checking the similarity between sending and receiving contexts, with the burden of proof of the claimed generalizability being put on the inquirer, and the burden of proof for the claimed transferability resting on the receiver. Dependability, a criterion parallel to reliability, focused on tracking methodological changes and shifts in construction. Finally, Confirmability, a criterion parallel to objectivity, focused on assuring that data, interpretations, and outcomes of the study were rooted in the contexts and persons apart from the researcher and were not figments of his imagination.

## CHAPTER IV

### PRESENTATION OF THE DATA

Every time a child is called mentally defective and sent off to special education for some trivial defect, the children who are left in the regular classroom receive a message: No one is above suspicion; everyone is being watched by the authorities; non-conformity is dangerous.

Granger & Granger, 1986

The data will be presented in two sections. The first section describes the context within which the study took place. The discussion first focuses on Malcolm X Middle School - its characteristics, structure, governance and culture. Consideration will be given to the impact that district, state and national reform efforts have had upon this particular school. In this section official documents which bear upon the study will be reviewed. (see Appendix A for list of documents). The second section describes the participants and the perspectives they hold on the issue of including exceptional students in the regular school curriculum. Vignettes of each teacher give voice to these participants and provide the reader with insights into such perspectives in the words of the participants themselves rather than those of the researcher.

## The Context

### The Community

Malcolm X Middle School is located in the northwest section of the city of Fort Lauderdale (population 149,377), Broward County (population 1,255,488) Florida. Broward County is situated in southeastern Florida; bounded on the east by the Atlantic Ocean, on the south by Miami-Dade County, on the west by the Everglades conservation area, and on the north by Palm Beach County. Together, Broward, Miami-Dade and Palm Beach Counties constitute greater South Florida, a large, complex and immensely diverse metropolitan area. According to the Broward County Department of Strategic Planning and Growth Management (DSPGM), Broward County is large in area, comprising almost 1,196.9 square miles, and is intimately linked to its maritime environment with 23 miles of coastal beaches and 266 miles of canals, 126 miles of which are navigable. Broward County has a subtropical climate with an average annual temperature of 75.4 degrees and an average annual rainfall of 62 inches (DSPGM, 1994). According to data from the Travel Industry Association of America (1997), location in Florida and proximity to Miami have enhanced Broward County's lure as a prime vacation spot for domestic as well as international travelers. This influx of visitors has created a distinctly international atmosphere for tourists, as well as the population to enjoy.

South Florida in general and Broward County in particular have both witnessed an incredible amount of growth due to immigration from neighboring countries in Central

and South America as well as the islands of the Caribbean. In addition, emigration of U.S. citizens from the colder climate and older economies of the American North and Midwest have caused the population of Broward County to soar. Fort Lauderdale exemplifies this upward trend, growing in population from 2,065 in 1920 to 149,377 in 1990 (DSPGM, 1994). This surge in population has made Fort Lauderdale the largest city in Broward County. The huge influx of people from international, as well as domestic locations has helped create a diverse, multi-racial/ multi-cultural population that has transformed the native culture into one that is on the cutting edge of race and social relations. According to the DSPGM (1994) the population of Broward County presents a racially complex picture indeed. (see Table 2).

Table 2:

Broward County Population by Race

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<u>Race</u>	<u>Number</u>
White (Non-Hispanic)	940,345
Black (Non-Hispanic)	186,670
American Indian (Non-Hispanic)	2,391
Asian (Non-Hispanic)	16,395
Other (Non-Hispanic)	1,248
Hispanic	108,439
Total	1,255,468



According to the Broward County Commission Office of Planning (BCCOP, 1992) 207,928 people, or 17.7% of the population speak a language other than English, and of these same people 80,694 do not speak English very well. A 1992 BCCOP compendium of ancestries self-reported by Broward County residents highlights this "mixing bowl" of language and cultures.(see Table 3) These figures serve to illustrate the tapestry of cultures, languages and traditions that make South Florida a unique, cosmopolitan area in which to live and work.

Table 3

Ancestries Reported in Broward County


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<u>Ancestry</u>	<u>Number</u>	<u>% of Total</u>
1. Arab	6,319	0.4
2. Austrian	15,692	1.1
3. Belgian	1,633	0.1
4. Canadian	6,972	0.5
5. Czech	5,395	0.4
6. Danish	3,884	0.3
7. Dutch	17,553	1.2
8. English	126,933	8.7
9. Finnish	2,052	0.1
10. French (except Basque)	42,753	2.9
11. French Canadian	12,960	0.9
12. German	204,269	14.0
13. Greek	9,193	0.6
14. Hungarian	18,150	1.2
15. Irish	167,755	11.5
16. Italian	140,204	9.6
17. Lithuanian	6,888	0.5
18. Norwegian	7,483	0.5
19. Polish	73,002	5.0
20. Portuguese	4,553	0.3
21. Romanian	9,476	0.7
22. Russian	73,064	5.0
23. Scotch-Irish	17,769	1.2
24. Scottish	22,822	1.6
25. Slovak	9,016	0.6
26. SubSaharan African	2,084	0.1
27. Swedish	15,579	1.1
28. Swiss	3,412	0.2
29. Ukrainian	5,452	0.4
30. United States or American	50,964	3.5
31. Welsh	7,396	0.5
32. West Indian (excluding Hispanics)	56,893	3.9
33. Yugoslavian	1,892	0.1
34. Other Ancestries	311,554	21.3
Total Ancestries Reported	1,460,986	100.0

The area immediately surrounding Malcolm X Middle consists largely of small, single family homes. These homes are for the most part neatly kept. However there is a large stock of homes that appear to be in various states of disrepair. A large county park located 3 blocks east of the school presents expansive vistas of green grass and huge trees as well as a small community center and the local branch of the Broward County Public Library. While this park might be seen as a valuable asset for the school's extra-curricular activities, it is rarely used because school personnel cannot guarantee the safety of visiting students. The northwest section of Fort Lauderdale in which Malcolm X Middle is located is one of the poorest communities in the state of Florida. Its' population is predominately African-American, the economic condition is marginal, and it is plagued with high rates of unemployment and crime.

### The District

Malcolm X Middle School is a unit of the School Board of Broward County, Florida (SBBC), the fifth largest school system in the United States. The district contains 127 elementary, 33 middle, and 24 high schools, as well as 6 adult / vocational schools and 11 alternative centers. It is also the county's largest employer with a staff of 12,052 instructors and 10,956 clerical and support people. According to About BCPS, a data sheet supplied by the district, Broward County Public Schools is one of the fastest growing districts in the nation. During the 1997-98 school year approximately 6,000-7,000 new students were added to its already burgeoning population of 223,633 pupils.

Of this total school population, the system serves 31,195 Exceptional Student Education pupils. Reflecting the multicultural / multiethnic nature of the community it serves, these students come from 164 countries and speak 54 different languages. The racial makeup of the district mirrors that of the larger community of which it is a part. (see Table 4)

Table 4

School Board of Broward County Student Population by Race

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<u>Race</u>	<u>% of Total</u>
White	45.6
Black	35.5
Hispanic	15.3
Asian	2.6
Indian	0.3
Multi-racial	0.7
Total	100%

According to a data sheet provided by the district, SBBC Statements and Priorities, the district's officially stated mission is to:

Commit ourselves to a philosophy of respect and high expectations for all students (pre-kindergarten through adult), teachers and staff; and with parent and community participation and partnerships, we will provide the process and support which will give our diverse, multicultural student population equal access to a quality education.

This mission statement, with its reference to *all* students and *equal access* seems to acknowledge the spirit of IDEA, and inclusion in general. District support for the inclusion of ESE students is further acknowledged in SBBC Statements and Priorities which declares, "Diversity should be promoted so that isolation of racial, ethnic, and socioeconomic groups is avoided; the full benefits of integration are achieved; and education is enhanced in a diverse, inclusive setting."

Overall, this information seems to suggest congruence between the goals of IDEA as well as of those parental and professional groups advocating increased inclusion of ESE students and the overarching philosophy that drives policy and procedures for the district. In 1992 the district created the Community of Learners whose mission was to collect data on, and disseminate information about, inclusion on a system-wide basis. According to Dr. Littell, a high level district ESE Coordinator, "The Community of Learners was a catalyst group representing all stakeholders directly or indirectly involved in the formal or informal education of Broward County students in the home, school and community. Their mission was to explore, research, and formulate an action philosophy dealing with the emerging issues of inclusion and the reauthorization of IDEA." This Community of Learners continued to expand not only the roles it played, but its breadth of membership as well. By 1993 its members included district level staff, Area level

staff, principals, teachers and parents. Community of Learners for Inclusion, a meeting summary, provided additional clarification on the role that the group envisioned itself playing in the inclusionary process. A spokesperson for the Community concluded, "It was formed to respond to the needs of parents who place a high priority on inclusive placements and to assist both parents and school personnel in making those placements successful." Apparently, the concept of including ESE students in regular education classes had begun gaining the support of an increasingly larger group of stakeholders within, as well as outside the School Board.

Further evidence of the district's commitment to inclusion can be found in Inclusion Discussion Outline, a summary of a meeting held on October 25, 1994 at a school board retreat, that was sent to all principals by the Superintendent of Schools. This summary made the following recommendations: 1) Continue to implement existing School Board policy on the least restrictive environment. 2) Ensure that, when existing policies are reviewed or new policies are developed, such policies are supportive of the concept of inclusion. 3) Initiate a four-pronged staff development plan which provides training in implementing inclusive teaching models, incorporates inclusion information in principal and assistant principal preparation programs, encourages universities to implement pre-service training in inclusive models, and provides financial incentives for regular teachers who acquire specialized training in ESE. 4) Request legislation that provides more flexibility and addresses the actual costs of providing mandated services. 5) Support the proposed philosophy statement regarding Inclusion in Florida.

This information suggests widespread acceptance of the underlying philosophy of inclusion as well as its benefits for exceptional students, by a large, representative group

of district stakeholders. It appeared as if an earnest attempt had been made to ensure that inclusion of ESE students would be a parent / school driven process; that it would emerge through bottom-up initiative, rather than top-down mandate. Information also suggests the district was ready to put its considerable weight and assistance behind professional development programs that would provide adequately trained personnel; teachers capable of implementing successful inclusionary programs. Evidence of this commitment to training can be seen in the 1998-1999 ESE Inservice Calendar which lists forty-two courses designed to improve teacher skills in the following areas: 1) Implementation of the new IEP's mandated by the 1997 Amendments. 2) Different instructional delivery models. 3) Instructional practices that foster inclusive classrooms. 4) In-depth courses focusing on strategies and practices that meet the individual needs of ESE students. And 5) Networking sessions with school based and district personnel that focus on strategies for effective implementation of services. What is glaringly absent in all this information is the *how* of inclusion. Although the Community of Learners and the district both disseminated information regarding known successful instructional practices, it would be left up to individual schools to decide how to best meet the unique challenges posed by ESE students and develop action plans to create their own inclusionary classrooms.

### The School: Setting and Context

Malcolm X Middle School is a relatively new facility that was first occupied in 1993. The physical layout of the school is quite spacious consisting of four academic and one science buildings, a media center, an administrative building, a gym, a cafeteria



and a vocational building. These separate buildings are connected by covered walkways that pass through two large, grass covered plazas and one huge concrete plaza that is softened in appearance by two completely tiled restrooms, a raised and landscaped flower bed and a series of geometrically arranged palm trees. The entire school is painted in soft tones of pink, blue, yellow and maroon and has recently been lushly landscaped giving it a distinctly tropical air. The school is clean and well kept due in part to a highly visible janitorial staff resulting in a minimum of graffiti and litter. School maintenance seems to be a priority, as broken fixtures and other items seem to be repaired or replaced on a timely basis. A communications tower that bristles with antennae giving the school a high-tech image dominates the campus from most vantage points. Ample playgrounds, tennis and handball courts, running tracks and athletic fields, including baseball, football and basketball as well as a large teacher parking lot surround the school. There is also a self-contained health center operated by the county hospital district located on school grounds that not only serves the school, but the surrounding community as well.

### School Safety

Safety on campus appears to be an important concern as closed circuit security cameras are in place in all walkways and the faculty parking lot. These cameras are monitored full-time by office personnel and keep a constant watch over the entire campus. A full-time Broward Sheriffs Officer and a security team consisting of five men and two women provide additional security. These security people are highly visible at all times and can be identified by a casual uniform consisting of a golf shirt with the

school emblem embroidered on the front, as well as by hand held radios which seem to be constantly crackling with urgent business. The need for such a large investment in security seems to be warranted by an aggressive air that permeates the campus. While not threatening in nature, the students appear to be quite physical in their dealings with each other, with pushing shoving and hitting being a common sight on campus. This emphasis on security is borne out by the contents of Improving Our Schools, Malcolm X Middle School. The 1996-97 Customer Survey. Student, Parent and Teacher Perspectives, a district produced customer survey of student, parent, and teacher perspectives on various aspects of life at Malcolm X Middle. According to this survey, when students were asked "I feel safe from crime at my school," 46.8% responded "never" and 28.1% responded "sometimes." When parents were asked, "My child is safe at his/her school", 31% responded "never" and 19% responded "sometimes." Teacher response to, "I feel safe from crime at this school" indicated 15.8% felt "never" and 40.4% felt "sometimes." Taken together, these responses seem to indicate the expense and utilization of staff dedicated to school safety are warranted, as many stakeholders perceive this to be an important issue confronting Malcolm X Middle.

### Student Growth and Access to Technology

The issue of school safety is related to, and perhaps aggravated by, the number of students attending Malcolm X Middle. The sheer number of students attending this school influences the perception that students are unusually physical in their dealings with one another. During class hours the campus is quiet and orderly, with few students

found outside their classrooms. However, during the change of classes the crush of students in the walkways on campus causes students to be in close physical contact with each other whether intentionally or not. According to a 1997 report issued by the Florida Department of Education entitled Florida School Indicators Report 1996-1997, student enrollment rose from 1,148 students during the 1993-94 school year, to 1,615 students in 1997-98. Currently, approximately 1,780 students attend Malcolm X Middle. This increased enrollment has caused virtually every possible space on campus to be utilized as either a classroom or office. Even though the school has made every effort to accommodate student and staff needs within the confines of the permanent structures on campus, 11 portable classrooms dot the schools property. While these portable classrooms are spacious, air-conditioned and provide most of the amenities of rooms located within the building, their separation from the rest of the campus is not only physical. They are also separated from the normal ebb and flow on campus, causing separation of spirit as well as location. In addition, because of security issues these portables do not have any computers. This glaring lack of technology denies students daily experience with an increasingly important source of information - the Internet. It also denies teachers access to the schools local computer network, as well as the district-wide computer network, both of which have become a widely accepted means of staff communication.

## Forces Impacting on Student Achievement

In addition to impacting upon school safety and access to technology, the burgeoning student enrollment at Malcolm X Middle has caused class size to increase to uncomfortable levels. Many regular education classes contain over 35 students and in some cases ESE classes reach levels approaching 25 students. Such large class sizes would seem to be a definite impediment to including exceptional students into regular education classes, as it is unlikely that few regular educators would welcome additional students into their already overcrowded classrooms. Class size is not the only problematic factor at Malcolm X Middle. Even though the school has a large pre-law and pre-med magnet program which attracts high achieving students on a county-wide basis, analysis of the student body reveal important concerns for those interested in increasing student achievement. According to the Florida School Indicators Report 1996-1997, the mobility rate, or the rate at which students move in and out of the school population during the year approached 35% of all students. Approximately 75% of the student body qualifies for free or reduced lunch; a figure that seems to mirror the economic realities of the surrounding neighborhood. The number of students absent more than 21 days during the school year approached 27.7% of the total school population, well above the county average of 17.6%. The percentage of students from the total enrollment who served in-school suspensions during the school year averaged 22.1%, while out of school suspensions averaged 22.6%, both above the county averages of 14.7 % and 14.1% respectively. According to a district data sheet, 1998 Stanford Achievement Test, Eighth Edition, Middle School Scores, standardized test scores at Malcolm X Middle are equally

disheartening. As shown in Table 5, 1998 Stanford Achievement test scores for Malcolm X Middle are well below district averages.

Table 5

1998 Stanford Achievement Test Scores for Malcolm X Middle School

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	<u>Grade Six</u>		<u>Grade Seven</u>		<u>Grade Eight</u>	
	<u>Reading</u>	<u>Math</u>	<u>Reading</u>	<u>Math</u>	<u>Reading</u>	<u>Math</u>
District	47%tile	59%tile	50%tile	58%tile	49%tile	56%tile
Malcolm X	21%tile	34%tile	30%tile	39%tile	31%tile	34%tile

According to Middle Schools: Florida Writing Assessment, results of the 1998 Florida Writes! writing assessment indicated an average score of 2.8 for eighth graders, which was below the district average score of 3.2. Taken together, data seems to indicate that Malcolm X Middle is beset by many of the same problems that plague inner-city schools nationwide; low socioeconomic status of students and their families, a high mobility rate that creates academic incoherence and chronic behavioral and safety issues. Solutions to such global issues lay beyond the reach of most schools, Malcolm X Middle included. However, many structural and cultural issues are being examined at the school level in an attempt to resolve problems unique to this particular school community.

### Structural and Cultural Issues

One area of concern that Malcolm X Middle has the ability to influence is the structure of the school itself. Previously, the school was organized in a bureaucratic, factory-like manner with classes being scheduled by the hour, and students moving among them by the ringing of a bell. Teachers taught in isolation, focusing solely on their area of subject matter expertise. Just as the school lives of students were controlled by the bell schedule, so were those of the teachers. Forced to teach by themselves for five, hour long periods, punctuated by a half-hour lunch, teachers rarely had opportunities to meet with and share concerns or ideas with other colleagues. Planning periods were scheduled in such a manner that teachers from the same grade-level team rarely planned at the same time. This thoughtless scheduling not only separated individual teachers from one another, it also resulted in the fracturing of entire grade-level teams making

innovations such as thematic units, team-teaching, and integration of the curriculum difficult to plan for and almost impossible to achieve. In addition, faculty and department meetings, as well as parent and other conferences had to be held before or after school hours due to lack of available time and the incoherence of planning periods. This traditional, industrial based organization also forced teachers to physically leave the school, usually for the entire day, if they wished to attend in-service classes necessary to keep abreast of the technological and curricular changes that characterize education in the 1990's. Such a structure hardly encouraged the type of collaboration and reflection called for by many contemporary school reform advocates.

A first step towards altering this archaic structure was taken during the 1997-1998 school year with the adoption of block scheduling. Rather than attending hour-long classes taught by individual teachers, students were taught by two-teacher teams, in blocks that lasted for an hour and a half. The ringing of bells was discontinued and teachers were encouraged to be more flexible and creative with their lessons in the hopes that student achievement might increase. While block scheduling encouraged more conversation among particular teachers, it did not yet allow an entire grade-level team to plan and discuss issues common to all team members. Nor did its mere implementation facilitate changes to the core educational practices of teachers in their classrooms.

### Comprehensive Management System

The next step taken by Malcolm X Middle to address the twin issues of non-collaborative climate and incoherence of scheduling of both teachers and students alike



was the adoption during the 1998-1999 school year of the Comprehensive Management System (CMS). CMS represented a school-wide effort to restructure the time management and organization of both students and staff alike. CMS was not an end in itself. Rather, it was an all-encompassing structure driven by a strategic plan. This plan was intended to provide a framework for school-wide communication and collaboration; a new framework that would according to its proponents, "organize adults to serve children."

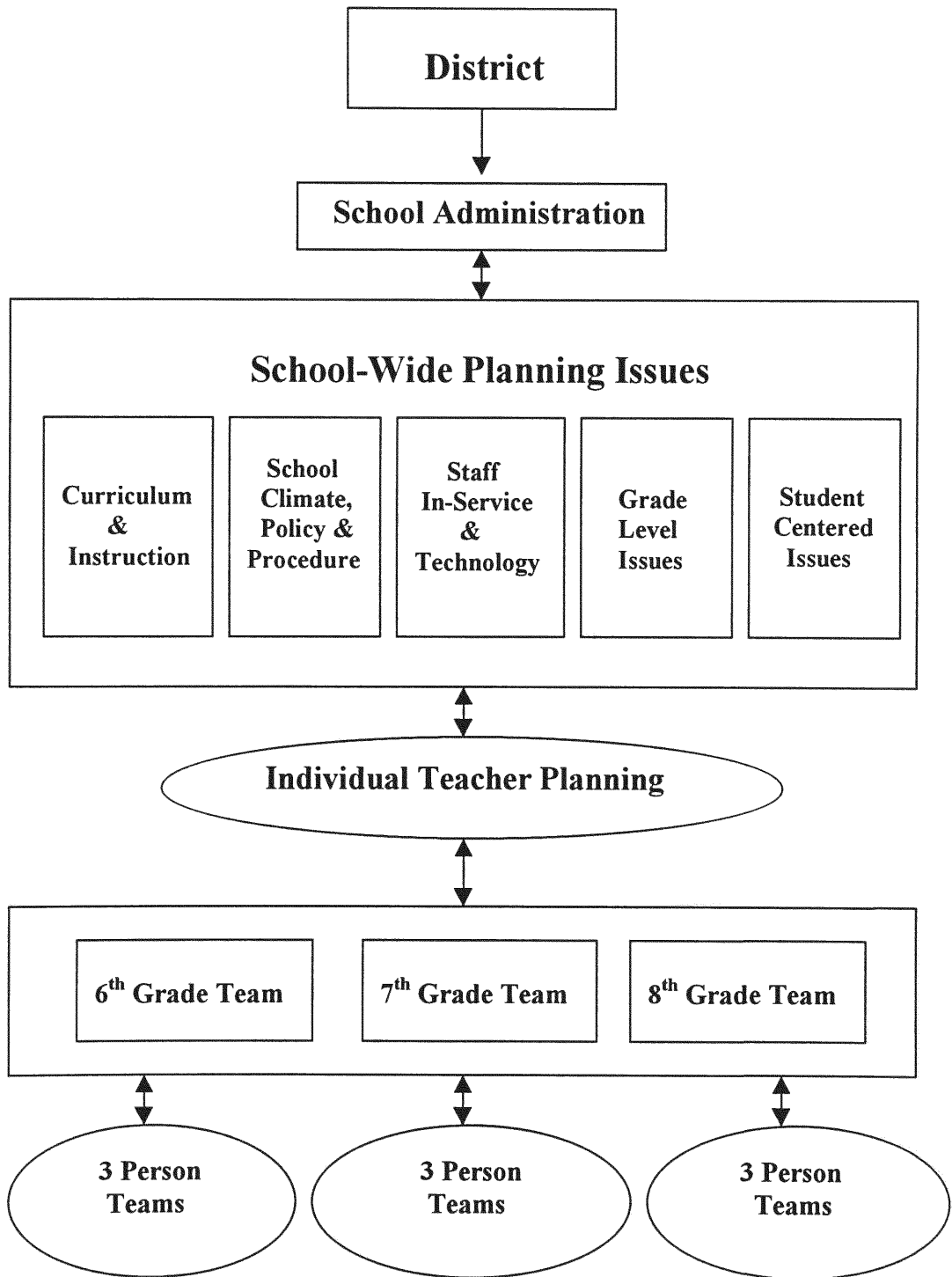
In contrast to the fragmentation of resources and staff created by the more bureaucratic school structure in place before CMS was adopted, this new way of organizing adults on campus sought to bring coherence to the time that teachers and students spent in school. According to Occhipinti (1998), CMS revolves around the following components: 1) Strategic staffing, in which all meetings are to take place during the normal school day and which gives consideration to teacher groupings focusing on the formation of pro-active, problem solving teams. 2) Static-free communication or a system-wide network formed to routinely exchange knowledge, and implement counsel from all members of the school community. 3) Creative scheduling in which planning time is team-oriented and uninterrupted is flexible, subject to continual refinement and is supportive of integrative activities. 4) Student Services Management Team (SSMT) which is a multi-disciplinary team that meets regularly to streamline services, such as counseling or behavior support plans, that the school provides to students having academic or behavioral difficulties.

The actual implementation of CMS at Malcolm X Middle has resulted in its doing business in an entirely new way. The school is now organized around focused and

coherent teams. (see Figure 1). Each of the three grade levels follows an almost identical schedule, with the only variation being the time students go to lunch. This schedule consists of three one and half-hour academic blocks; a half-hour school-wide correlative block, and an elective block. Each grade level is broken down into smaller two to three-teacher teams; however, the entire grade level team has the same planning hour. In addition, planning time has been increased by a half-hour each day so teachers can attend in-service classes without leaving the building, and hold meetings or meet with administrators during normal school hours. This change of structure allows for entire teams of teachers to collaborate and plan at both the grade level as well as at the team level. By organizing adults in such a manner, the faculty hoped the following benefits would accrue: 1) An increase in communication among all staff members due to common planning time. 2) An enhanced ability to develop creative schedules. 3) The ability to hold all essential meetings during normal school hours. 4) An increased ability to meet the educational needs of all students. 5) An end to the isolation of teachers due to the increased ability to utilize alternative teaching strategies such as team-teaching and co-teaching. 6) A greater ability to include ESE, Chapter 1, Drop Out Prevention (DOP), and English for Speakers of Other Languages (ESOL) students in the regular curriculum. 7.) The ability to provide staff development during the instructional day in small group settings. It would seem that Malcolm X Middle was poised to break the mold; that it was willing to change it's traditional organization and structure so that meaningful educational reform might indeed take place.

Figure 1

Malcolm X Middle Organization Flowchart



According to Occhipinti (1998) CMS is an organizational system in which all national initiatives can be implemented and expected to flourish. Inclusion of ESE students in regular classes is now a more distinct possibility at Malcolm X Middle due to common teacher planning time and flexible teacher / student schedules. In addition, notes from a CMS planning session indicated that ESE classes were to be totally integrated with regular classes on each grade level team as part of Malcolm X Middle's new strategic plan. These factors would seem to provide teachers with the additional time and human resources that have been identified as critical factors for the success of inclusionary education. Site-Based Management has also been enhanced by the adoption of CMS. A key concept of CMS is the involvement of everyone in the school community in decision-making matters. All staff members are expected to serve on various committees so that collective decision-making becomes the norm, rather than the exception in the day-to-day operations of the school. Traditional faculty responsibilities blurred as teachers took a more active role in the decision-making processes of the school; while at the same time administration began adjusting to the role of facilitator, rather than dictator of school policy and procedure.

It should be mentioned the staff at Malcolm X Middle did not originally seek out the adoption of CMS. Rather, it was brought to the school and the high school into which Malcolm X students articulate by the district office as a model program. Although the facilitators that helped to implement the system sought much staff input, CMS was not a true bottom-up initiative. After representative planning groups met over a three month period at the end of the 1997-1998 school year, the final details of the system were ironed

out and minimal staff training was provided to inform teachers of the new ways in which they were going to work.

However, after a year's experience with CMS many teachers at Malcolm X Middle feel more comfortable with the change it has brought to their school. Notes from a January 7, 1997 grade level meeting in which teachers met with facilitators who introduced CMS to the school to discuss the "growing pains" they were experiencing indicated a growing acceptance of the process. Some staff members complained that "the blocks are too long", while other teachers countered, "the blocks were long at first, but now it seems to be working better." Mike, one of the facilitators pointed out, "the blocks will be long if you teach the normal way... that you must have lots of different things to do during the block", which caused many teachers to nod in agreement. Mike further pointed out that, "more staff development would help teachers overcome this barrier." Mention of staff development set off a lively conversation among teachers, with responses ranging from, "we get too much in too little time, we can't absorb all the material", to others who contended, "staff development is the initial key, we can't do it like we did it before." During the entire meeting the tone of discussion was extremely collegial in nature, with the merits of numerous points of view being discussed and debated, and most teachers at the meeting seemed to appreciate having the ability to meet as an entire team rather than in smaller, disconnected groups. While it remains to be seen whether the top-down initiative provided by CMS, with its focus on structural issues, will translate into the cultural changes necessary for a truly reflective and collaborative school community to emerge, initial teacher reaction at Malcolm X Middle seems positive indeed and prospects for the success of CMS are hopeful.

## Forces Behind Change

The notion that Malcolm X Middle needed to change the way that teachers taught and students learned was accentuated by a 1995 report Recommendations for Malcolm X Middle School, a needs assessment developed by a team from the Innovation Zone to which the school belonged. According to a district data sheet, Innovation Zones, an Innovation Zone consists of a cluster of schools that includes a high school, middle school(s), elementary schools and centers, all of which are organized in a feeder pattern or community-centered concept thought to promote a smooth, constant base of support. According to this data sheet, by belonging to Innovation Zones, "individual schools benefit through coordination, collaboration and shared decision making with other area schools... and that Zones create a bottom-up decision making process."

This Zone-based needs assessment was in response to Malcolm X Middle's being placed on a critically low performing school list by the Florida Department of Education in 1995. According to a report issued by the Florida Department of Education entitled 1996-1997 End of the School Year Report for Schools with Critically Low Student Performance, Malcolm X Middle was one of 158 schools in the state that had extremely low standardized test scores in the areas of reading, writing and mathematics during the 1994 and 1995 school years. This needs assessment recommended numerous changes thought necessary to increase academic achievement at Malcolm X Middle and included, but was not limited to the following: 1) All stakeholders needed to be involved in the planning, development and implementation of the School Improvement Plan (SIP). 2) The School Improvement Team (SIT) should be refocused so that all members are

actively committed to following the SIP from development through implementation. 3) Exploration of a mechanism for academic change (i.e. CMS) should be initiated. 4) The establishment of a school-wide professional development plan was critical. This needs assessment formed the basis for Malcolm X Middle's 1996-1997 SIP, which was instrumental in removing the school's critically low performing status at the end of that school year. Baseline data was collected, goals were developed and assessment measures were identified, all part of a successful effort that refocused the schools energy in the areas of reading, writing and mathematics.

This needs assessment also included the Readiness to Change Matrix, a survey that identified the level of readiness various groups at Malcolm X Middle had for change along five dimensions: knowledge, commitment, history of collaboration, readiness and needed structure. A summary of responses of administrators indicated that they were on level 1, which indicates not ready, in their overall readiness for change. A summary of teacher responses indicated they were on level 2, which also indicates not ready, in their overall readiness for change. It would seem then that changes such as block scheduling, CMS and extensive staff development had been set in motion without much input from a faculty that apparently was not ready for such change to take occur, placing the effectiveness of such measures in grave doubt.

### Impact of State Reform

In response to national efforts such as the SCANS report (1991) which emphasized the creation of retooled, high performing schools graduating students

endowed with 21<sup>st</sup> century competencies and skills, the Florida Department of Education released Blueprint 2000 A System of School Improvement and Accountability (1991), which began:

The Legislature recognizes that the children and youth of the state are its future and its most precious resource. To provide these developing citizens with the sound education needed to grow to a satisfying, productive adulthood, the Legislature intends that by the year 2000, Florida establish a system of school improvement and education accountability (p.2).

With this grandiose statement, Florida began looking at its schools through a different lens. After years of legislating policy and dictating daily school operation, Blueprint 2000 "reversed this trend by restoring to those closet to the students the ability to determine the *how* of public school education" (p.2, emphasis in the original). The intent of this plan was to raise academic standards and to decentralize the system so that local school districts would be free to develop learning communities that best suited the needs of their own students. It also sought to hold schools accountable for such flexibility in achieving standards - in terms of improved student performance.

This new system of improvement and accountability consists of six components that work together to improve education: state education goals, the school improvement process, local flexibility, performance indicators and reporting, accountability for results, and the Sunshine State Standards. Rather than dictating policy and procedure from the capital in Tallahassee, the state's role has become one of setting standards, measuring results, and assisting schools in improving student performance while at the same time granting local districts flexibility in designing learning environments to meet these state goals.



## State Goals

The first component, state education goals, are statements designed to provide a focus for achievement in Florida schools. According to the Florida Department of Education plan, The Basics of School Improvement and Accountability in Florida (1996-1997), the eight goals include: 1) Readiness to start school, or the preparation of students for school success. 2) Graduation rate and readiness for post secondary education and employment, or students being prepared for these roles after graduation. 3) Student performance or the ability to compete academically at the highest levels, both nationally and internationally. 4) Learning environment, or school boards providing environments conducive to learning. 5) School safety and environment, or schools that are drug-free and protect students' health, safety and civil rights. 6) Teachers and staff, or schools being staffed with adequately trained professionals. 7) Adult literacy, or all students being able to read and exercise their rights and responsibilities of citizenship. 8) Parental involvement, or parents being active members in school improvement.

These goals have certainly affected everyday school life for all stakeholders at Malcolm X Middle. While always being a top priority, student achievement became the number one concern for Malcolm X Middle, driven in part by the strong desire to remove the school from the critically low performing schools list. Freed from the old industrial model, teachers were able to team and become more collegial. Block scheduling allowed more freedom to experiment and innovate in the classroom. CMS structured the school so that much-needed professional development was available to teachers attempting to cope with the massive amount of change that was swirling around them. Apparently,

state education goals had begun facilitation of the change process that would be necessary for Malcolm X Middle to better meet the needs of all its students.

### School Improvement

The second component, the school improvement process, represents a collective effort of the entire school community to reach state and local education goals. This participatory process involving all stakeholders, parents as well as faculty, strives to create true site-based management capable of making informed decisions about curriculum and instruction at individual schools. The product of this collaboration is the school improvement plan, a document that drives all academic activity and insures accountability for results at each school. This plan is based on each school's needs assessment and includes activities to address state goals and performance standards, evaluation methods, definitions of adequate progress and requests for waivers. The SIP is evaluated by the district at the end of each school year to determine if its' goals have been met. Individual schools having problems reaching locally developed goals invite increased district and state collaboration when developing revisions to such less than successful plans.

The notion of accountability implicit in this component has had serious impact on Malcolm X Middle. Years of ineffective planning and low student test scores had caused the school to be placed on the list of critically low performing schools. Retaining the ability to make school-based decisions regarding curriculum and instruction, Malcolm X Middle, with additional support and assistance from both the state and district, focused on

those aspects of the SIP that impacted on student achievement. Changes were made in the curriculum delivered to students and increased professional development was provided to teachers so that they might be more effective in their classrooms. Flexibility in developing solutions to low test scores coupled with accountability for the results of such locally developed efforts seem to be critical components in the removal of Malcolm X Middle from the list of critically low performing schools. In addition, the school improvement process also encourages individual schools to describe how the needs of ESE students will be met by the objectives of the SIP. A draft version of Focus 2000 1999-2000 School Improvement Plan, acknowledges the existence of inclusion at Malcolm X Middle. It describes how "ESE students are being educated in the least restrictive environment according to their IEP's, providing them with education with their non-disabled peers and exposing them to different strategies and activities developed to increase their achievement levels." However, just as the Community of Learners failed to provide the nuts and bolts of how to *do* inclusion at the district level, Focus 2000 does not mention how the inclusionary process will be accomplished at Malcolm X Middle. It would seem development of a program to accomplish this goal would be left up to the professional discretion and expertise of individual classroom teachers.

### Local Flexibility

The third component, local flexibility, provides local school districts with waivers to school statutes so that they have maximum flexibility in designing responsive learning environments for their students. The intent of this component is to grant individual

schools maximum flexibility in designing curriculum and organizing courses. Malcolm X Middle currently does not take advantage of any of these waivers. However, discussions by the schools Curriculum Council have recently focused on attaining a waiver so that more time may be spent during the school day to focus on math and reading instruction in a continuing effort to raise standardized test scores.

### Performance Indicators and Reporting

The fourth component, performance indicators and reporting, is an essential part of the system used to report to the community at large, how successful individual schools have been at meeting the eight state goals. Malcolm X must distribute an annual School Accountability Report to parents and the community. The report is a brief summary of the schools' efforts on sixteen performance indicators related to the state's eight goals. This "report card" is an additional measure that holds Malcolm X Middle accountable for the decisions it makes regarding curriculum and instruction in its' classrooms. In addition to "grading" the academic efforts of Malcolm X Middle, the report is also critical in providing its' parents with information necessary to become active members of the school improvement process.

### Accountability for Results

The fifth component, accountability for results, is a mechanism designed to ensure that locally made decisions do indeed help individual schools meet the state's eight

education goals. Florida law requires assistance to and accountability for schools that fail to make adequate progress towards meeting these state goals. Two methods are used to determine if adequate progress towards goals have been made. By self-report, schools not making adequate progress on their school improvement plans (using local definitions) are reported annually to the Commissioner of Education. Additionally, those schools which have been determined to be critically low performing on the basis of low standardized test scores are also thought to be making inadequate progress towards meeting state education goals. In either case, schools failing to make adequate progress receive three years of assistance from their school district and the state. According to the Basics of School Improvement and Accountability in Florida (1996-1997) such assistance shall include, but is not limited to, providing resource materials, identifying training, facilitating improvement activities, identifying human and material resources and disseminating information about successful programs (p.10). Malcolm X Middle benefited from such assistance after it was put on the critically low performing list in 1995. State funds allowed the school to purchase additional technology and textbooks, while a needs assessment developed by the district focused the schools attention on strategies to improve test scores. This needs assessment also made the school aware of additional resources that could possibly facilitate the change process that had already begun at Malcolm X Middle.

## Sunshine State Standards

The sixth and final component, Sunshine State Standards and assessments, set clear expectations on what students are expected to know and have the skills to do. In developing these standards the state conducted extensive research, consulting national experts and teachers and administrators throughout Florida. Business leaders, parents, teachers, higher education faculty and citizens reviewed drafts of the standards in an attempt to achieve a wide-ranging consensus on their goals and content. The standards represent a strong foundation for all Florida schools to set high expectations and provide quality instruction for all students.

Standards have been developed for four grade clusters: PreK-2, 3-5, 6-8 and 9-12, in the areas of language arts, mathematics, science, social studies, the arts, health and physical education and foreign languages. While the standards contain explicit strands, standards and benchmarks, districts have been given maximum flexibility in determining how to best meet these standards in relation to the unique situations that exist at the local level. According to the Florida Department of Education handbook, Sunshine State Standards (1996), "The standards don't tell teachers how to teach. Nor are they lesson plans. They are only guidelines that tell teachers and parents what students are expected to know and do." (p.iv). In addition to setting standards, an assessment system aligned to these standards has been developed. Consisting of Florida Writes! (a writing assessment), the Florida Comprehensive Assessment Test (a criterion referenced test based on concepts embedded in the standards) and the High School Competency Test (required for graduation), this assessment system will be used not only to measure how

well students are doing in school. They will also be used to gauge the effectiveness of school reform and accountability in Florida.

It would be difficult to dismiss the affects these standards have had upon Malcolm X Middle. For better or worse, the Sunshine State Standards have effectively aligned curriculum and instruction with assessment at all grade levels. On the positive side, these standards have set clear goals for students and teachers alike; each fully aware of exactly what knowledge and skills they are expected to learn and teach. Most new series of textbooks bought by the school are aligned to the standards, so teachers have an efficient means of covering the concepts contained in the standards. Schools also have an efficient means to evaluate student progress with the curriculum by means of assessment tools closely aligned to these same standards. It could be argued that the new standards and the change they imposed upon curriculum and instruction were instrumental in raising test scores to such an extent that Malcolm X Middle was taken off the critically low performing schools list.

However a common complaint among faculty members was that they were forced to "teach to the test"; that other important, worthwhile concepts were not introduced in their classrooms due to the incessant drive to increase test scores. It would seem these standards have the power to drive the curriculum to such an extent that creativity, rather than being encouraged, may actually be stifled in the classroom. Many teachers at Malcolm X Middle resent having to document the use of these standards in their daily lesson plans; believing this requirement to be an unnecessary intrusion on their professional expertise and judgement. Speaking of this administrative requirement, one ESE teacher summed up the feelings of many colleagues complaining, "I write them only

because I have to, I don't think this really assists the kids in any way!" In addition, how ESE students are to meet the high expectations these Sunshine State Standards strive to achieve is quite unclear. This uncertainty is reflected by the numerous calls for modifications made by a number of ESE teachers. According to Catherine, the ESE Specialist at Malcolm X Middle, "I'm not sure about the standards since I have been out of the classroom for a while. I feel all students should have access and learn from the standards. I know they will probably need modified, or alternate standards." This belief that the standards need to be altered for ESE students was echoed by Susan who complained, "I don't think ESE students fit into the standards; they are above the kids levels" and Karen who argued, "My students are too low to fit into the standards. I use different standards to build my lessons." Both of these ESE teachers seem to have grave reservations about the ability of their students to achieve success with the demanding content of these standards. Jane, another ESE teacher, questioned the ability of ESE students to pass the test covering the standards content by arguing, "I think the Sunshine State Standards should be revised for ESE students and another way of testing should be incorporated to help students meet requirements for state standards." The hesitance of teachers to embrace the levels of rigor demanded by these new standards does not bode well for successfully including ESE students in regular classrooms at Malcolm X Middle. Regular teachers, already hesitant to accept ESE students into their overcrowded classrooms would hardly welcome additional students ill-prepared to meet these standards. This hesitance is especially understandable when accountability for performance becomes equated with increased student test scores. It would seem that the Sunshine State Standards have enormous power to drive the activities of Malcolm X



Middle. From text adoption, to scope and sequence of curriculum, to instructional practices, to accountability for student progress - all are driven by the need to successfully implement these new standards.

### Strategic Plans

In addition to enabling components contained in the new system of improvement and accountability, information suggests other state activity promoting the development of inclusionary programs. In 1993 the Florida Department of Education developed a multi-part, five-year strategic plan to increase academic achievement in schools across the state. One component, Strategy VIII, Action Planning Team, Inclusion, claimed to address problems associated with the process of inclusion by designing and implementing a plan to ensure successful inclusion of individuals with exceptionalities. According to Strategy VIII, "We must shift and expand our perspectives on special education.... Strategy VIII allows us to deliberately choose a new orientation and selectively abandon those practices that no longer contribute to our collective progress." Strategy VIII consisted of the following twelve objectives: 1) To establish a regional support network to assist in the implementation of the action plan. 2) To build and maintain effective collaborative relationships between parents / families and professionals which support inclusive education. 3) To develop and implement a sequential and comprehensive training plan to ensure successful inclusion. 4) To restructure certification and recertification requirements. 5) To identify and use validated instructional strategies that support successful inclusion. 6) To ensure full accessibility of all facilities. 7) To

reallocate available funding to support inclusion. 8) To establish multi-level indicator / evaluation systems for determining the status on inclusion. 9) To promote school board policies and procedures that support inclusion practices. 10) To ensure students in residential facilities have the maximum ability to participate in the community. 11) To ensure that quality support services are available to students with exceptionalities in inclusive environments. 12) To market successful inclusion practices.

In a fashion similar to the system of improvement and accountability, the role of the state in this action plan is that of enabler and facilitator, rather than provider of standard solutions. The common theme that seems to bind all these state efforts together is the notion that the system is intended to encourage thinking in new ways about how schools do business. In such a system the state provides guidance and assistance, allowing local schools maximum flexibility to provide solutions that make sense in their own contexts. In the case of Malcolm X Middle, despite support from the state in the form of information and technical assistance, the school has yet to develop a systematic and cohesive plan to include exceptional students in regular classrooms. It would seem that action taken by individual teachers towards reaching the goal of creating a learning environment that best suit the needs of ESE students is the critical factor that has yet to emerge in the ongoing debate surrounding how to best meet the educational needs of all students at Malcolm X Middle.

## Funding Issues

Finally, the manner in which the state funds ESE students may be viewed as a critical factor in a local schools ability to include exceptional students in the regular curriculum. According to the Florida Department of Education, Matrix of Services Handbook (1998) until the end of the 1996-1997 school year the state provided weighted levels of funding (cost factors) for fifteen ESE programs. Students who received services in these programs carried the weighted cost factor for a specific program whenever they were served in an ESE class. This cost factor was applied to any student eligible for the services of that program, regardless of the severity of the student's need and the services necessary to provide an appropriate education. These weighted cost factors were identified as major barriers to including ESE students in regular classes as any additional funds were available only when the student was in an ESE class; effectively denying ESE students access to the schools regular curriculum. This funding barrier to inclusion ended in 1998 when changes in the formula used to fund ESE students resulted in the following revisions: 1) Five cost factors, rather than fifteen, are used and are based on the severity of the student's needs and the intensity of support required. 2) The cost factors are tied directly to the services received by the students, not the location in the school where services are actually provided. This new formula was developed in response to new federal regulations that sought to ensure placement-neutral funding of exceptional students. Under the new regulations a Matrix of Services form is developed, documenting what special services and supports a student requires to be successful in school; no matter if the child is in an ESE classroom or a regular education classroom.

A cost factor is derived from this Matrix and is used to determine the level of funding that student generates for the entire school day. This new funding formula effectively ends the virtual banishment of ESE students to self-contained special education classrooms and gives them access to the regular curriculum in areas appropriate to meet their unique educational needs. When asked to respond to the question, "Do you think the Florida Department of Education supports / facilitates, or simply hands mandates to local districts in their inclusionary efforts?", Dr. Littell a district ESE Coordinator responded, "The most impressive form of support is adequate funding. Florida has recently shifted its funding system. ESE students now receive funding according to their severity during the entire day in their educational placement. This shift provides for easier inclusion by providing for funding in regular education classes." For Malcolm X Middle, this new way of funding ESE students provides additional flexibility in developing programs that will allow the school to meet one the goals outlined in Focus 2000 - that of including ESE students in regular education classes.

### Impact of National Efforts

It would seem that teachers at Malcolm X Middle have a "full plate" of issues that need addressing. Structural changes such as block scheduling and CMS, curricular demands brought about by the Sunshine State Standards and increased demands for student progress and accountability for results on standardized test are surely a sufficient amount of issues to deal with on a simultaneous basis. However, the challenge of including ESE students in regular education classes has recently been added to this

"stewpot" of reform demands. Although many similarities exist between regular and special education reform, such as an emphasis on teaming of staff, increased cooperation and collaboration, taking into account teaching and learning styles and a commitment to continuous learning, recent events in Washington, DC have created a situation that promises to bring an even greater sense of congruence between and regular and special education reform.

### The 1997 Amendments

The urgency for regular and special educators to find common ground on the issue of inclusion heightened on June 4, 1997 when President Clinton signed the Individuals with Disabilities Education Act Amendments of 1997, PL105-17 (the 1997 Amendments), into law. This law amended and reauthorized the Individuals with Disabilities Education Act (IDEA). In 1975, when its predecessor PL94-142 was passed, the issue confronting exceptional students was access to appropriate evaluation and placement. The law focused on procedures that would ensure that students' educational rights were clearly defined and protected. However, as we approach a new millennium access to an appropriate education is no longer an issue. The primary concern for educators of the late 1990's is to ensure the quality of education that exceptional students receive. The 1997 Amendments can be seen as the next step in providing exceptional students with a quality education; one that emphasizes improvement of student performance.

According to the United States Department of Education IDEA Report to Congress (1998), IDEA was responsible for a great deal of progress in the education of exceptional students including: 1) An increase of 31% in the number of ESE students graduating with a diploma, from 96,210 in 1986-87 to 126,051 in 1995-96. 2) The number of ESE students spending at least 80% of the school day in regular classes has more than doubled, from 1.1 million in 1986-87 to 2.3 million in 1995-96. 3) Total number of ESE students served under IDEA rose 29%, from 4.5 million in 1987-88 to 5.8 million in 1995-96. 4) The per-child allocation of special education dollars from the Federal government rose 107%, from \$258 per child in 1984 to \$535 per child in 1997. The estimate for 1999 is \$702 per child.

However, Congress also recognized that implementation of IDEA was hampered by low expectations, an insufficient focus on translating research into practice and too much emphasis being placed on paperwork and procedure rather than teaching and learning. Congress viewed the reauthorization process as an opportunity to strengthen and improve IDEA. According to a Senate report, 20<sup>th</sup> Annual Report to Congress on the Implementation of IDEA this improvement would be accomplished by: 1) Strengthening the role of parents. 2) Ensuring access to the general education curriculum and reforms. 3) Focusing on teaching and learning and reducing the burden of unnecessary paperwork. 4) Assisting education agencies in addressing the costs of special education. 5) Giving increased attention to racial, ethnic, and linguistic diversity to prevent inappropriate identification and labeling. 6) Ensuring that schools are safe and conducive to learning. 7) Encouraging parents and educators to work out differences using non-adversarial means. The 1997 Amendments seem to have brought schools closer to achieving the

goal sought by proponents of the Regular Education Initiative of the mid 1980's - the shared responsibility of regular and special education teachers for ESE students. While the REI with its notion of including ESE students in regular education classrooms seemed radical in nature in 1986, its goals seem to be in alignment with many contemporary reform efforts. In particular, congruence exists between the goal of a more equitable system of education for all students and Florida's Blueprint 2000 which also emphasizes high expectations, increased collaboration among staff and innovation in teaching/learning strategies. Perhaps the shift in paradigm between education in the 1980's with its obsession with technical innovation, and education in the 1990's which emphasizes collaboration and shared decision making, has enhanced the probability for successful inclusion to occur. As the passage of the 1997 Amendments has put the full weight of Congress behind the movement towards inclusion; the question educators need to ask themselves is no longer, *Should* we include ESE students in regular classes? Rather, the question is *How* do we include ESE students in regular classes?

### Least Restrictive Environment Revisited

Just as Blueprint 2000 helped Florida schools travel down a new path by encouraging and facilitating their efforts to do business in a different way, the 1997 Amendments have forced schools nationwide to look at the education of ESE students in a new light. Perhaps one the most important changes brought about by the 1997 Amendments is the increased emphasis it places on exceptional student involvement in the general curriculum. The concept of educating exceptional students in the least

restrictive environment (LRE) has been the cornerstone of educational planning for these students ever since the passage of PL 94-142. According to the U.S. Department of Education guide, Questions and Answers on the Least Restrictive Environment Requirements of the Individuals with Disabilities Education Act (1994), states must have in place procedures assuring that:

To the maximum extent appropriate, children with disabilities are educated with children who are not disabled, and that special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occurs only when the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily (p.3).

While understanding what LRE is can be elusive because it differs for each child receiving special education and related services, it seems as if the regular classroom has been viewed at both the federal and state level as the appropriate starting point of an exceptional students education.

According to the U.S. Department of Education (1994) in implementing the IDEA's LRE provisions:

The regular classroom in the school the student would attend if not disabled is the first placement option considered for each disabled student before a more restrictive placement is considered (p.4).

However, accomplishing this goal requires a shift in paradigm in the way schools plan for the educational needs and placement of exceptional students. Rather than asserting why they *cannot* meet the needs of exceptional students in the regular class, schools are now being asked to determine how they *can* meet those needs in the regular class and in addition what supplementary aids and services would be necessary to reach that goal. This "can" philosophy seems to be a major factor driving the placement of



exceptional students in Florida, at least at the state level. According to the Florida Department of Education training manual, Least Restrictive Environment Decision Making: Practical Decisions for Functional Practices (1994):

In providing for the education of exceptional students, the superintendent, principals, and teachers utilize the regular school facilities and adapt them to the needs of exceptional students to the maximum extent appropriate (p.2).

The emphasis on LRE has not changed with the 1997 Amendments; in many respects it has actually been strengthened. Prior to 1997 the concept of LRE was applied to the *location* in which special education services were provided. With the reauthorization of the Act, the focus of LRE shifted to the *content* of the education being provided to exceptional students. The 1997 amendments shifted the focus of IDEA to one of improving teaching and learning and emphasized the participation of exceptional students in the general curriculum - in the regular classroom.

The change in focus of LRE from location of services provided to content of services provided exceptional students has wrought an enormous amount of change in the district in general and Malcolm X Middle in particular. When asked, "What do you think caused Broward County to formulate/adopt its current attempts toward including ESE students in regular classrooms?" Dr. Littell responded, "Broward as other school districts in the country has responded to the reauthorization of IDEA. Schools are required to look at regular education first when planning for the educational needs of ESE students, then back students out when education cannot be provided in that setting. "While the district's position regarding the LRE provisions of IDEA seem to be in congruence with the spirit of the Act, how individual schools were interpreting LRE certainly was not.

## The OCR Visit

In November of 1997 the U.S. Department of Education, Office for Civil Rights (OCR) conducted an on-site visit of various district schools, Malcolm X Middle included, to determine if they were in compliance with all the provisions of IDEA. OCR came to Broward County to monitor the number of exceptional students receiving special education services, as well as where those services were being provided. Particular attention was paid to students who were not attending their home schools or who were not being served on a typical campus. According to OCR Questions and Answers, a report issued to parents of exceptional students by the district, "When OCR looked at Broward's number of students in special education centers and compared this with national norms, our numbers were much higher." The report also concluded, "OCR findings indicated that far too many exceptional students were placed in special and alternative centers and that the district needed to provide more supports and services at the secondary level in typical schools for exceptional students."

The district responded to this OCR monitoring report by developing six model classrooms during the 1998-1999 school year. These sites, located in typical middle and high schools, attempted to identify the supports and services needed to ensure the success of center student's transitioning back to the LRE of these regular schools. According to a district resolution entitled Broward's Response to OCR Compliance Review, these model classrooms (OCR Classes) have a four to one student to staff ratio, with additional supports provided by a job coach, family counselor, and behavior specialist. Malcolm X Middle is the site of one of these six OCR Classes. This class provides services to

students returning to Malcolm X from special centers that serviced students with Autism, as well as those students classified as Trainable Mentally Handicapped (TMH) and Educable Mentally Handicapped (EMH); all categories that are considered severe; requiring considerable amounts of accommodations and additional support services. The arrival of the OCR Class at Malcolm X Middle was significant for a number of reasons. It heralded the beginning of the district's attempt to develop a coherent, system-wide plan for including exceptional students in regular schools and regular classrooms. According to Dr. Littell, "The formulation of a district-wide inclusion plan was never developed until the OCR mandate. Previously, inclusion was handled on a case by case basis." It would seem that the LRE provision in the 1997 Amendments has been a strong catalyst for change for the district, as well as Malcolm X Middle.

The OCR Class also served as "laboratory" for successful inclusionary practices. Technical assistance was provided from the state by means of the Florida Inclusion Network (FIN), a concept developed in Strategy VIII, and a component of the state's strategic education plan. A facilitator from FIN assisted in setting up and organizing the class, introduced a wide variety of appropriate materials, and continues to provide support on an as needed basis. The district has provided Karen, the classroom teacher, with extensive training opportunities, allows time for her to visit other school sites for observation of successful programs, and has provided funds to purchase technology and other additional materials.

Although model sites, such as the OCR Classes, served as catalysts for change at both the district and school-site levels, the top-down, district driven process used to develop them seems to be at odds with the collaborative culture that Malcolm X Middle

is attempting to establish. During their visit, OCR monitors spoke with school-based and district personnel, neglecting to get parent input entirely. The development of the resulting OCR Classes and support services that would accompany them was a district product that was simply "installed" at each school. Catherine, Malcolm X's ESE Specialist, first learned about the class at a meeting she was mandated to attend. Neither she nor anyone else in Malcolm X's administration participated in the formulation of this class; its existence was actually surprising to them. Catherine also reported, "Many parents are not so sure that they want their children out of the center and back in a regular school." It would seem that after winning many hard fought battles with the district over provision of adequate services for their children, parents are not so willing to believe the district's claims that student's will continue to receive the same level of services at Malcolm X, that they would have gotten in special centers. In addition, lack of parental involvement in the development of OCR Classes seems incongruent with the desire of federal and state efforts to increase parental participation in the educational process. Discussing the levels of involvement that various stakeholders have had in the development and implementation of inclusion in Broward County, Dr. Littell commented, "Throughout the past six years stakeholders have been more or less active depending on the issues at hand or the focus of the inclusion process. As a result of the OCR visit to Broward in the fall of 1997, inclusion plans were developed to satisfy the OCR mandates. Stakeholder participation became skewed as Broward was mandated to develop a plan with specific outcomes. Not all stakeholders were in consensus." Thus, it remains to be seen if the OCR Class at Malcolm X Middle will receive the wide-spread support from both school staff and parents that is necessary for its continuing success.

## Procedural and Structural Issues

The 1997 Amendments contained a number of procedural and structural improvements its authors hoped would facilitate the cultural change necessary for the re-convergence of regular and special education. Chief among these improvements is the focus on the Individualized Education Program (IEP) as the primary tool for enhancing the child's participation and progress in the general curriculum. According to new statutory language, each child's IEP must now include the following information: 1) A statement of the child's present levels of educational performance including how the child's disability affects the child's involvement and progress in the general curriculum. 2) A statement of measurable annual goals related to meeting the child's needs that result from the child's disability to enable the child to be involved in and progress in the general curriculum. 3) A statement of special education and related services and supplementary aids and services. 4) A statement of program modifications or supports from school personnel that will be provided for the child to advance towards achieving the annual goals, be involved and progress in the general curriculum, and participate in extra curricular and other nonacademic activities and to be educated and participate with other children with disabilities and nondisabled children. (IDEALAW, 1999). Proponents of the Act hoped the explicit language used in the regulations would encourage schools to develop innovative, inclusionary programs for exceptional students.

Certainly, changes in the composition of an IEP have forced Malcolm X Middle's staff to reconsider precisely what impact exceptionality has on the ability of the student to progress satisfactorily in school. Teachers must now consider what a child *can* do, rather

than what they *cannot* do and what supports and modifications will be necessary to achieve that goal. Furthermore, the long held notion that exceptional students must "earn" their way into regular classes has finally been laid to rest. Strong language contained in the 1997 Amendments affirms exceptional students' rights to instruction in regular classes. Even the order in which an IEP meeting is held has been affected by the Act. Prior to 1997, the IEP committee first determined a student's placement and then proceeded to develop a plan to meet the student's needs in that class. Under the new regulations placement decisions have been moved to the end of the meeting. The committee must first decide how the student is achieving in relation to the general curriculum and what modifications and supports are needed to help the student progress with the general curriculum. Only after all that information is taken into account does the committee decide what setting best suits the student's overall educational needs--with the regular class being the first option they must consider.

Special education teachers are not the only staff members at Malcolm X that must adjust to the paradigm shift brought about by the 1997 Amendments. For the first time, a regular education teacher must participate in the development of a child's IEP. This new regulation may address the concern of many regular teachers at Malcolm X Middle. Commenting on the lack of communication between regular and special education, Gene a regular educator complained, "Sometimes it's hard to know exactly what is going on with ESE kids. I was told there was a list of ESE kids in classes given to regular teachers, but I started teaching here later in the term, so I don't have it. The only reason I know that I have ESE kids in my class is that when I have conferences with these kids they tell me they are ESE. I didn't even know who were the ESE kids and who were the regular

kids." Gene was also dissatisfied with the old IEP process, pointing out "I really didn't feel sufficiently included in the IEP meetings that were held for the ESE kids in my class." Given the growing collaborative nature of Malcolm X Middle, this new regulation may "make sense" and not be viewed as simply another onerous task to try and fit into an already crowded schedule. At the very least, this procedural change is likely to result in improved planning for the educational needs of exceptional students at Malcolm X Middle.

The 1997 Amendments made it easier for Malcolm X Middle to provide aids and services to exceptional students in regular classes. According to a memorandum entitled New Duties Under the Individuals with Disabilities Act (IDEA) 1997, that was sent from the School Board's attorneys to the Superintendent, "Notwithstanding the IDEA's prohibitions on commingling of funds, the 1997 Amendments allow local education agencies to use IDEA funds for services and aids that benefit both disabled and nondisabled children." This provision may prove to be a critical factor in Malcolm X Middle's ability to include exceptional students in regular classes. Coupled with the teaming and collaboration fostered by Malcolm X's adoption of CMS, this provision may allow ESE supports and services to follow exceptional students into regular classrooms. Given the dismal test scores of many Malcolm X students, any additional assistance given to exceptional students would probably benefit many other regular students as well. The ability to provide additional support to ESE students in regular classrooms may well be a strong "selling point" for inclusion to regular teacher's hesitant to accept these students in their classes.

The final change brought about by the 1997 Amendments requires that exceptional students be included in state and district-wide assessment programs with modifications made as necessary. Under the new regulations, each IEP must contain statements as to what modifications the student needs in order to participate in these assessments. This requirement highlights the importance placed on having exceptional students in regular classes where they can be exposed to the curriculum necessary for success on new state assessments. However, it is not clear whether changes such as simply spelling out modifications in an IEP and having a regular educator on the IEP team will translate into actual implementation of these modifications in the classroom. When Gene was asked, as a regular educator, what value a student's IEP and Matrix of Services has in planning for the educational needs of his class, he responded "My planning involves everyone in the class, including ESE students. However, I try to assist the ESE students as best as I can." It would seem that use of these documents as sources of information about exceptional students has not yet become a reality for regular educators. Perhaps the lack of familiarity with the IEP process prevents regular teachers from understanding exactly what duties they have concerning the exceptional students in their classes. The district has provided professional development opportunities throughout the year to assist both exceptional and regular teachers deal with the massive amount of change brought about by the 1997 Amendments. However, only ESE teachers seem to have taken advantage of the trainings - no regular educators at Malcolm X have attended these in-service courses. Although all regular teachers in the district were sent a memorandum informing them of their new responsibilities under IDEA by the Superintendent, many still seem to be unsure of their role in the planning process.



Perhaps the mere sending of a memorandum was not a strong enough measure to more closely involve regular educators in the IEP planning process. Considering the fact that the new responsibilities regular educators have in meeting the needs of exceptional students have now become legal as well as educational, the clarification of Malcolm X's teachers roles in the planning process seems to be a critical factor that must be addressed for successful inclusion to take place.

### Summary of Contextual Issues

Life for teachers and students at Malcolm X Middle has been filled with an enormous amount of change over the past few years. Beset by many of the same ills facing urban schools across the country such as low test scores, poor attendance, overcrowded facilities and widespread behavior concerns, Malcolm X was a prime example of educational obsolescence. Emulating a rigid, factory-like industrial model that was more appropriate for the first half of the century than for the rapidly emerging information age, Malcolm X Middle found itself out of step with the times. Run by the ringing of bells and frozen by the compartmentalization of knowledge, Malcolm X Middle found it increasingly more difficult to meet the educational needs of all its students. It seemed as if providing students with "more of the same" was not an adequate response to the growing public demand for improved academic performance. Although the school seemed to be aware of the problem of decreasing academic achievement, its archaic structure did not allow for the creative solutions that would be necessary to

address this critical issue. It would take the influence and directives of "outside forces" to push Malcolm X Middle down a new educational path.

State reform efforts that granted school districts maximum flexibility to develop learning environments that made sense in local contexts, enabled Malcolm X Middle to create an entirely new structure that would allow it to do business in a new way. Block scheduling was introduced so teachers would have more time to interact with fewer students. CMS was initiated allowing more time for collaboration and planning as well as increased staff development; a critical component of the school's plan to change core educational practices in the classroom. Accountability for increased student performance has placed enormous pressure on all staff to produce the desired result--increased test scores. Along with the Sunshine State Standards, these new assessments have the power to drive most issues of curriculum and instruction at Malcolm X Middle. While these state efforts are quite explicit in meeting the needs of regular education students, it is less clear how exceptional students will fare under their influence. The issue of modifying standards for ESE students still needs further clarification and implementation.

Along with these state efforts, the 1997 Amendments have brought about a profound shift in how Malcolm X Middle must plan and provide services for its exceptional students. Emphasis is now placed upon how Malcolm X *can* provide services to exceptional students in regular classes, rather than why it *cannot*. The regular classroom and its general curriculum has now become the preferred starting point of *all* students, exceptional included. No longer must ESE students "work their way out" of self-contained special education classes. Strong language in the 1997 Amendments calling for regular classroom placement has put an end to this discriminatory point of

view. Emphasizing the *content* of a child's education rather than its *location*, the reauthorization of IDEA strives to ensure the quality of educational services for exceptional students. This shift of paradigm has caused Malcolm X Middle to re-examine precisely how it provides services to its exceptional students and has given individual teachers the opportunity to formulate and implement a plan to include ESE students in the regular curriculum.

### The Participants

Initially, the participants in this study included two regular educators, Linda an eighth grade language arts teacher and Gene an eighth grade math teacher. It also included two exceptional educators, Karen the OCR Class teacher and Bob an eighth grade Varying Exceptionalities (VE) teacher. All were on the same eighth grade team except Karen, who was on the sixth grade team. Being on the same team at Malcolm X Middle allowed this group of teachers to plan and collaborate together, to design curriculum and to share information among themselves about problems and successes they were experiencing in their classrooms. Such a high degree of collaboration and scheduling certainly encourages the inclusion of exceptional students into regular classes. Linda and Gene were asked to participate in the study because both had exceptional students included in their classrooms. Karen was asked to participate in the study because her OCR Class represented the district's first attempt at including exceptional students in regular schools on a system-wide basis. Her class was multi-grade (6-8) and consisted of students considered as being severely disabled. Therefore, educational

planning for these students did not include placement in a regular class. Rather, planning revolved around meeting their educational needs in an ESE class at a regular school. For Karen's students, the ability to attend a regular middle school rather than a special education center is testimony to the push towards inclusion brought about by the 1997 Amendments.

As the interviewing process evolved and other relevant issues and questions became more apparent, additional participants were added to the initial group of four. Many references were made to Catherine who is Malcolm X Middle's ESE Specialist. An ESE Specialist performs many functions including coordination of all official paperwork involved in the IEP planning process, assisting with placement and scheduling of all ESE students, scheduling and chairing all parental meetings, and facilitating communication between regular and exceptional education teachers. These responsibilities virtually ensured Catherine's role as a key player in the inclusionary process that was unfolding at Malcolm X Middle. Susan, the ESE Department Chairperson, was asked to participate in the study in order to gain a departmental perspective on inclusion, as her position made her privy to many teacher issues and concerns at Malcolm X Middle. Jane who taught the self-contained ESE Behavior Class provided additional perspective on inclusion. Jane's class is the "last stop" in a regular school for her behaviorally challenging students, providing the most restrictive environment possible at Malcolm X Middle. If students were not successful in her class the next step in the cascade of services would be the more restrictive environment of a special education center - a placement not encouraged by district, State or Federal perspectives and regulations. Finally, district outlook was gained from Dr. Littell, a high-

level ESE Coordinator responsible for the implementation of all ESE policies and procedures in a specific geographical area of the district.

A final note must be made regarding the artificial distinction being made between regular and exceptional educators in this study. Currently, Malcolm X Middle is in the preliminary stages of including exceptional students in regular education classes.

According to a database of ESE students attending Malcolm X Middle, out of a total of 104 exceptional students who spent most or all of the day in an ESE class, only 11 had been included in a regular class. The balance of these ESE students were being provided educational services in self-contained classrooms. The isolation of ESE students in special classes extended to ESE teachers as well. ESE teachers were perceived by many other staff members at Malcolm X as being a breed apart; possessing teaching skills thought appropriate only for exceptional students. Even those exceptional teachers who had students included in regular classes had little contact with regular educators.

Inclusion at Malcolm X Middle followed the mainstreaming model in which teachers of included students met informally, if at all, in order to fill out a form that documented what services were being provided to these exceptional students. This model provided no time or opportunity for teachers to collaborate and develop the strategies and modifications necessary for the included students' success in these regular classrooms.

This almost total separation between regular and exceptional educators at Malcolm X Middle has created a condition in which both groups are seen as being distinctly different from each other. Thus, the distinction made between regular and exceptional educators simply reflects the context and nuances of the particular school under study. In the next

section I will describe these seven teachers perspectives on including exceptional students in regular education classrooms.

### Teacher Perspectives: The Regular Education Teachers

#### Gene's Perspective

Gene was a soft-spoken, young Haitian-American mathematics teacher. Although he had taught for five years, this year had been his first at Malcolm X Middle. When not in his classroom, he could usually be found seated at his desk in the teacher planning room hard at work grading student papers or planning for upcoming classes. Neatly dressed at all times, he portrayed what one might expect a young professional man to look like. Gene was always eager to talk about his students and seemed to be quite dedicated to helping them succeed in his class. You can tell that Gene had a passion for teaching because he dedicated every moment spent at Malcolm X working with or planning for his students. Perhaps it was just a reflection of the subject he taught, but Gene appeared to be a serious young man indeed.

Gene's classroom was slightly larger than most in the building. Perhaps that is why it didn't seem to be crowded even though it usually contained 30+ students. The atmosphere in Gene's class was one of serious business. While not bare, the walls were covered with a minimal amount of decoration, most of it being teacher-produced visual aids. References to mathematical processes abounded in the room - conversion charts for different measurements, formulas to find the areas of varying geometric shapes, keys to

math abbreviations and many more visual clues surround Gene's students. Desks arranged in rows of three to five snaked around the room, all facing the center. It was quite obvious where attention was focused in Gene's class - on the teacher. Most of Gene's students seemed to feel comfortable with this situation as the majority paid attention and were on task while Gene taught lessons.

The first thing one noticed when entering Gene's room was the obvious amount of preparation that had gone into his lessons. Agendas were placed on the board, assignments were clearly spelled out and problems were already posed on the overhead projector, all ready for his students as they walked through the door. Lessons were presented in a calm, business-like manner, with Gene providing the information to students, followed by student question and practice. Although it was very much a teacher-centered process, the use of peer tutoring was evident during Gene's lessons. There was a constant undertone of quiet conversation among Gene's students as they attempted to complete their assignments; a buzz of students helping peers that needed assistance. Gene had a busy job indeed. During most of the lesson he could be found circulating among the students as they raised their hands for assistance with problems. The use of peer tutoring seemed to be a necessary strategy in this busy classroom, as Gene did not have the luxury of a full time aide to help him answer student questions. This strategy was valuable for the ESE students in Gene's class as it was difficult for him to provide them with any additional assistance above and beyond what regular students in his class received. Gene seemed to be quite concerned with the behavior of students in his classes. When asked to think about a typical day in his classroom, Gene thought for a moment and then replied:

Well, sometimes I have good days here and sometimes I have bad days. It really depends. If I have a class with a student that has behavior problems, if they weren't in my class I could have a good day. Once that student walks in the room I could have a bad day. My good days here are based mostly on behavior problems.

While quite knowledgeable about mathematics, Gene seems to be less sure of his knowledge regarding exceptional students. When asked what he knew about inclusion Gene replied with a terse yet definitive statement, "Nothing, it has no meaning for me!"

This response would seem to indicate that the furor inclusion has caused among ESE teachers at Malcolm X Middle has not yet affected regular educators to the same degree. While Gene was aware of the fact that exceptional students were participating in regular classes to a limited degree, he was unfamiliar with the terminology and issues associated with the process as it existed at Malcolm X. Gene was equally unsure about the impact a student's exceptionality has on their ability to succeed in school. Speaking of his ESE students, Gene admitted:

It's my understanding special education kids have some kind of learning disability, one or another. But to tell you the truth, I don't know exactly what type. I know a little bit, but not much. For example, when you say a child is SLD, these codes I don't have stuck in my head. I can't elaborate exactly what they mean. Students come into my classes with different labels and I'm not really sure what they refer to. It might not only be an academic problem. They could have some sort of behavior problem too.

This complaint underscores an important weakness in the on-going inclusionary process at Malcolm X Middle - lack of understanding of the differing characteristics of exceptional students on the part of regular teachers. Gene felt:

We need to know more about their exceptionalities. What exactly do they mean? We have to know about the ESE



students in our classes. The school absolutely needs to provide in-service to deal with the issue of ESE labels!

It appears that unlike ESE teachers, who are trained to take into account the effect that differing exceptionalities have upon a student's ability to succeed in school, regular teachers are expected to deal with this issue with little or no prior understanding or experience.

Gene seemed to be somewhat satisfied with the organization of Malcolm X Middle. In particular, he enjoyed the benefits of block scheduling. When asked to comment on the effectiveness of block scheduling, he eagerly replied:

Oh I love it! I started it from college, to the high school where I taught, to here. I've always taught by the block. I like it because you have more time to teach the kids! I think the kids grasp the material better. For example, you have fifty minutes to teach the lesson and give them the rest of the block to do their work. In the meantime you can pass by and see if they understand the work. Teaching by the block allows you to be more flexible. You can also have collaborative work. Once you finish teaching the lesson you can put them into groups working together. I think it's great!

It seemed that Gene was comfortable with block scheduling and considered it beneficial for his students despite the additional time demands it imposes upon teachers. His use of alternative teaching methods such as cooperative learning groups took advantage of this increased time factor and represented the change in core teaching practices that administration at Malcolm X Middle so eagerly encouraged.

Gene was less satisfied with CMS and the many opportunities it provided for meetings. Believing the structure of Malcolm X Middle hindered his ability to improve as a professional, Gene admonished:

We really don't have too much time to plan. We always have some kind of meeting to go to, things to do. I certainly think we could meet just once a week to discuss the problem kids are having in the classrooms. We don't need to meet three or four times a week. If we have a full block to teach, we should have a full block to plan for that lesson so we can meet the needs of the kids. But it doesn't happen like that! We always have other meetings to go to. Even they last only 30 minutes, that's time not spent in actual planning for my class.

Although CMS holds out the promise of adequate time to plan and share ideas among colleagues, reality may be an entirely different story. Even though teachers at Malcolm X Middle have gained an additional half-hour per day of planning time due to the implementation of CMS, it would seem that required meetings and in-service activities may have actually reduced the time teachers have to plan lessons for their classes.

Gene appeared to be supportive of non-traditional strategies shown to be effective in teaching exceptional as well as regular students, such as cooperative learning. When asked to comment on what instructional practices he considered as having a positive impact on exceptional students in his classroom Gene responded:

Hands-on activities. I certainly think we need to give them more practice with things. We need to give them other resources which have hands-on activities, not just deskwork or looking at books. Hands-on activities are important. Basically, things besides seatwork. I have these things available in my classroom. And, yes I use them!

Gene was well aware of the extreme learning problems prevalent among Malcolm X students and was quite comfortable with multi-sensory techniques such as the use of manipulatives with all students in his class. When asked if he used the same strategies to teach both regular and exceptional students Gene was adamant:

Yes, they work with both groups of students! Just following the book has a negative impact on all students. Sometimes all the kids have a hard time following the books! The book I use in class is actually a good book, but sometimes it is hard to follow and even the regular kids have a hard time with it. Sometimes the teacher needs to get away from the book for the regular as well as the ESE students in class. I also think we can use more study guides. These guides give students more practice with concepts from the textbook. It is more work for them, but is actually less complex. These guides could give all the students in class more practice.

Gene's use of hands-on activities and study guides with all students not only provided them with additional learning and comprehension strategies. It also allowed ESE students to "blend" in with the rest of the class as everyone was expected to participate in these activities - regular as well as exceptional. His use of multi-sensory techniques and large doses of practice seemed to be effective with his hard to teach regular students as well as the with his ESE students.

Although Gene was generally receptive to innovative teaching strategies such as peer tutoring and cooperative learning; he was quite hesitant about sharing responsibility for students with another teacher in the same classroom. Gene really liked the concept of the three person teams used at Malcolm X explaining:

Well it's good in a way because you can send your kids to another teacher. Or you can talk to the other teachers and find out what the kid's problem is. You know, what they do to make kids behave in a certain way. Team teaching is good.

However, Gene definitely had a negative opinion regarding the possibility of having additional support in his class on a full-time basis.

You know during the few days I have had here, not days months, I have had an aide. She has been some help, but

when she is here I feel that I am not doing my job. She tries to work with the kids that have behavior problems. These kids give her a hard time instead of trying to work with her. Once they see her, believe me I am going to have the worst day of my life! She's been working with them for a long time, since the sixth grade I think, and now they are in the eighth grade. I'm not even sure it would be better even with a certified teacher in the room.

When the subject of co-teaching, or the shared responsibility of a regular and exceptional educator for the same class, in the same room was raised, Gene was even less receptive. Gene hesitatingly replied:

Co-teaching? I never had that before. Co-teaching might be an experience, only for a short period of time. But for a long period of time? No! I'm not sure if we would be on the same level or a different level. That's the whole thing.

It seemed that the notion of teams of teachers working together to meet the needs of students is something that Gene could support - as long as this team was not inside his classroom. Gene also seemed to have some territorial concerns regarding co-teaching. He appeared to be mostly concerned with the issue of who would be "in charge" of a co-taught classroom.

The growing professional culture at Malcolm X Middle required its teachers to be able to respond to the questions - What meaning does the term "professional" have for education? As well as, "Are teachers truly professionals?" As the structure of Malcolm X Middle became more collaborative in nature and teachers took on more active roles in the planning of curriculum and instruction, their ability to function in a more self-directed mode rather than simply a "worker" mode took on increasing importance.

The following definition was supplied to all participants as we discussed varying aspects of the topic: "A profession is an occupation that regulates itself through

systematic, required training and collegial discipline; that has a base in technological, specialized knowledge; and that has a service, rather than a profit, orientation enshrined in its code of ethics" (Starr, 1982, as cited in Curry, Wergin & Associates, 1993). Gene was quite resolute in response to the prompt, "Do you consider teachers to be true professionals?"

Yes I certainly do! I think that for myself that I am a true professional. First, I really care for the kids. No matter what kind of kid walks into my classroom. You know in this profession, if you don't care you shouldn't be a teacher. I have different ways, different styles of teaching the kids. I have the knowledge and ability to develop and implement different teaching strategies. Someone who is not trained would not be able to do that.

Although his knowledge of exceptional students was admittedly weak, Gene's perception of himself as a seasoned professional allowed him to overcome this disadvantage. It appeared that Gene placed a high value on his professional abilities and viewed them as a source of strength in his dealings with exceptional students in his class. When asked if his training, experience and knowledge had any impact on his ability to teach ESE students, Gene replied:

Yes, absolutely! I think my education and experience have prepared me to work with exceptional students. I have worked with every kind of kid and I know I can reach all kinds of students. I feel quite secure in my professional ability to teach ESE students.

Gene's view of his educational experience seemed to be a contradiction in terms. While quite confident that this experience had prepared him to teach any kind of student, regular or exceptional, Gene also had been quite vocal about his lack of understanding of exceptional students labels and the impact they had on student achievement.

A critical aspect of Malcolm X Middle's quest for increased professionalism that needed examination was the culture, or the beliefs and values held by all members of the school community, that existed at the school. Just as schools cannot separate themselves from the community in which they exist, neither could Malcolm X's teachers ignore the impact the school's culture had on their everyday lives. Gene viewed the culture that existed at Malcolm X Middle as a source of enrichment for his professional development arguing:

Well you find a great diversity of ideas in this school. Everyone is treating everyone with respect. Really, what else could you ask for? I really feel this respect we have for each other is the hallmark of professionalism.

Gene's belief that the culture at Malcolm X Middle supported a diversity of ideas certainly bodes well for those teachers who seek to change the way the school does business. In particular, it seems as if conditions at Malcolm X may be ripe for exploring different means of including exceptional students in regular classes.

Gene was less certain in his belief that the structure/culture of Malcolm X Middle had a positive impact on the inclusion of exceptional students in regular classes. Although he believed that block scheduling helped the inclusion process, "Because you get to spend more time to work with the kids," Gene had some additional concerns about Malcolm X's ability to successfully include ESE students in its regular classes. Having already complained about the lack of communication between regular and special education, Gene described the lack of support, material as well as human and financial, he had been receiving in his classroom. Although he was a strong proponent of using

hands-on activities to reach his hard to teach students, Gene felt hampered by a lack of materials and money to accomplish that goal lamenting:

Materials? I don't have much that's for sure! I don't even have enough books for my kids! To really include ESE kids you need extra money, because I know for sure if they had more access, I would stay after school to work with them if they wanted. That would be a little different because when you're working with these kids they already know what the lesson will be on. So then you could find out exactly what are their questions, what they can do and what they can't. If I had extra money I could spend extra time with the ESE kids. That would let me work more one-on-one with them.

Perhaps the most telling of Gene's comments regarding inclusion of exceptional students in regular classrooms were his recommendations for successful inclusion at Malcolm X Middle School.

I would recommend that the school hire more ESE teachers. Maybe the pay is too low to keep ESE teachers. Of course you need more funds. If more ESE teachers were hired, that would help keep the ESE kids in those classes because I think it's best for the kids to stay in one classroom setting.

Although Gene supported the inclusion of exceptional students in regular classes, this support may be described as lukewarm at best. Rather than viewing the regular classroom as the preferred placement for exceptional students, Gene believed that the needs of exceptional students would be better met in self-contained, special classrooms. Gene seemed to adhere to the old mainstreaming model of inclusion in which exceptional students had to prove their readiness to be included in regular classes. It was quite apparent from his responses that Gene did not support a team approach to including exceptional students in his classroom. Although he welcomed ESE students into his class, the notion of other having other professionals providing services in his classroom,

either co-teaching alongside him or providing other push-in support services was definitely not acceptable. It seemed as if Gene felt more comfortable with the notion of teachers being responsible for all activities that occurred in their classrooms, rather than the sharing of expertise that a team approach might provide. This solitary attitude might also help to explain Gene's hesitant acceptance of the many meetings that are required of teachers by the new structure imposed on Malcolm X by CMS.

Gene's strong faith in his past educational experiences and in his professional preparation seemed to be at odds with his need for more information regarding exceptional students. Although he considered himself to be supremely prepared to teach any type of student, his lack of knowledge regarding the effect an exceptionality has upon a student's ability to learn was glaring. While his past education may not have prepared him to understand exceptional education labels, Gene did seem to be well versed and comfortable with many strategies that exceptional educators use in their own classrooms. The use of peer tutoring, cooperative learning, and hands-on materials for instruction are all strategies that have been shown to work well with exceptional students. Related to the implementation of these instructional strategies in Gene's classroom, was his complaint that he did not have sufficient materials or funds, to do so in the most successful manner possible. Gene's past experience with block scheduling also seemed to enhance his ability to work with exceptional students in his classes. As a matter of fact, block scheduling was the only aspect of Malcolm X's structure that he felt furthered its ability to include exceptional students in its' regular classes. Table 6 presents a summary of Gene's perspectives on inclusion.



## Linda's Perspective

Linda was a young, outspoken African-American language arts teacher who began her teaching career at Malcolm X Middle and had remained on its staff for the past three years. Always nicely dressed and professional in appearance, Linda was full of enthusiasm and energy. This enthusiasm extended beyond her classroom door, as she was constantly involved in many of the schools activities. You could usually catch Linda collecting money for a field trip or chaperoning a party or dance for her students. Linda was always willing to share her opinions and was supportive of the other members of her team in which she took an active part. Linda seemed to have a thirst for knowledge and constantly strove to increase her professional effectiveness by attending the many non-mandatory workshops and in-service activities offered by Malcolm X Middle. Linda was definitely a "projects" type of teacher. During the previous school year Linda had utilized a Break the Mold grant she received from the district to create a rain forest on campus. Taking almost the entire year to complete, Linda and her students turned the inside of her portable classroom into a space that was filled with the plants, animals, sounds and smells that would greet a visitor to a tropical rain forest. This exhibit served as a valuable resource to the entire school, as Linda arranged for all the classes at Malcolm X to "tour" this student created space.

Table 6

Gene's Perspective on Inclusion

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- Lukewarm supporter of inclusion.
- Believed needs of student's are better met in self-contained exceptional classrooms.
- Adhered to outmoded mainstreaming model of inclusion.
- Believed student had to prove academic and behavioral readiness to be included in a regular class.
- Did not believe in team approach to classroom instruction. Did not support co-teaching or collaborative consultation. Would accept assistance of paraprofessional.
- Preferred being the lone teacher in the class due to issues of power and territory.
- Did not believe in joint responsibility for students between regular and exceptional education.
- Contradictions existed between his perceived ability to teach all students and his lack of knowledge regarding exceptional students.
- Used instructional strategies that were appropriate for included exceptional students in his classes.
- Complained of lack of materials thought necessary to include exceptional students in his classroom.
- Believed that block scheduling and CMS were helpful for including exceptional students in regular classes.

Linda's classroom was like most others at Malcolm X Middle. It was rectangular in shape, painted in a light tone of green, the floor was covered by a burgundy rug, a row of floor to ceiling windows with vertical blinds lined the entrance wall, a storage closet covered the rear wall and two long side walls were covered by whiteboards. What was most striking about Linda's room was the amount of visual aids and student work displayed in virtually every corner of the room. The walls were covered by an impressive amount of student products, written as well as visual. Large, colorful illustrations of family trees, color charts with descriptive words, photo essays and examples of student written poetry lined the walls, while a large Cuban piñata dangled from the ceiling. Added to this cacophony of sights were numerous visual aids designed to help students become better writers; aids representing the latest thought on reading/writing/study skill strategies such as KWL Charts, Fishbone Organizers, and examples of Fat and Skinny questions. It was obvious that Linda incorporated these strategies in her lessons, as a number of them appeared to be works in progress. Desks were arranged along the two sidewalls, three to four deep, all facing a wide aisle that ran the entire length of the center of the room. Linda's area of the room looked like a picture of "planned disorganization". Neat piles of student work covered her desk as well as the floor in back of it. In addition to her own student's work, the floor of her room had been covered for a number of weeks by school-wide submissions to the Literary Fair that Linda sponsored at Malcolm X. From the amount of student products on display it was quite obvious that student performance was a high priority in Linda's class.

Linda's dealings with her students might be described as professional yet caring. She was warm and respectful towards them, interjecting bits of humor throughout her lessons. Linda was generous with praise for a job well done; however she quietly but forcefully reprimanded students when necessary. Linda appeared to have gained the respect of most students as her classes were generally well behaved and on task. Actually, Linda's students appeared to genuinely like talking with her, an accomplishment in a school in which many students felt alienated from most staff members. However, behavior was as critical issue for Linda as it was for Gene.

A typical day in my class? It takes a long time to get the kids situated because of the behavior problems I have to address. By the time I finally get them wound down, then we can start the lesson. But throughout the lesson I have to address the same behavior problems, and some that comes from my ESE students. Not all ESE kids have behavior problems though. Some of them just have learning disabilities--it really depends on their particular problem. In this school some of the regular students have behavior problems that exceed those of the ESE students! Behavior is not really an ESE problem; it's a school-wide problem. If the teacher in class is strong, there shouldn't be any special behavior problems with just the ESE students. Basically, the ESE students would fit right in behaviorally with the regular students. Academics are important for these ESE kids because I just take it for granted that behavior is a school-wide issue.

While the behavior of exceptional students was as much a concern for Linda as it was for Gene, both teachers seemed to believe that it wasn't really an exceptional education issue. Rather both perceived the behavior of students as a school-wide issue. Linda's lessons usually took full advantage of the time afforded by block scheduling. Speaking of the benefits of teaching by the block, Linda explained:

I like block scheduling because you get closer to your students. You have less students to deal with and you have more time to get to know your students. You get to know their strengths and weaknesses. I feel that the school basically prepared us for block scheduling. The only thing they didn't prepare us for was Critical Thinking. They are trying to do that now, but it's a little too late. I do feel that it's a waste of time. There's really little time to do anything in the 15-20 minutes that you actually have to teach it. Besides, we don't have any materials to teach it. None! I think Critical Thinking should be devoted to teaching phonics instead.

Linda's criticism of the Critical Thinking block suggested a need for Malcolm X to reexamine its purpose. Originally designed to accommodate school-wide reading enrichment activities, this 30-minute block appeared to be unfocused and lacked the curriculum and materials needed to take advantage of its brief time. Linda's other classes usually consisted of a number of mini-lessons, moving from group instruction, to independent seatwork, or to cooperative groups working on projects. Linda viewed the structure of her classes, a series of different yet connected activities, as one of the prime advantages of teaching by the block. In addition, Linda viewed these mini-lessons as being extremely advantageous for her exceptional students. Commenting on the ability of her ESE students to focus on lessons being taught, Linda cautioned:

You have to give them kinesthetic, hands-on activities. Yeah, they need hands-on things, maybe projects. They need lots of visuals. It's hard to give them just one thing; you have to move quickly. You can't stick to one thing for too long because they get agitated and jumpy, so you have to move fast. Thirty minutes of this, then thirty minutes of that! You need to engage all the kid's senses and break your lessons up into smaller segments.

Linda always presented a wide variety of assignments for her classes to complete. Echoing Gene's concern of simply teaching the text, Linda disdained an over reliance on

bookwork. Commenting on instructional practices that had a negative impact on exceptional students in her class, Linda was emphatic.

What things shouldn't you do? Bookwork, strictly bookwork. Bookwork is good from time to time, but you need to get away from the traditional teaching methods and try some non-traditional strategies. If you stick a kid, any kid not just an ESE kid, with just bookwork they get bored. Then they become a behavior problem. Do the strategies I use with ESE students work with the regular students in class? Absolutely!

Although Linda seemed to be a bit more informed than Gene about exceptional students and the challenges they pose, it is clear from her responses that she too was unclear about many issues regarding exceptional student education. While she employed instructional practices and techniques that are commonly used in ESE classrooms such as breaking lessons into smaller segments and providing students with manipulatives, Linda was able to provide only a brief description of inclusion. Linda's conception of inclusion was:

Inclusion? Is that when ESE kids come into your classroom? I believe it's when the student is included in the classroom with other students, students that are non-ESE.

Linda was also aware that exceptional students may present any number of different problems and that each must be looked at on an individual basis. When asked to describe the general characteristics of an exceptional student, Linda explained:

It depends because there are different types of ESE students. There are behavior problems. Then you have kids that are slow as far as their learning disability. Then you have some kids with other problems, so it just depends. There really isn't any one kind of ESE student. They can have a number of problems.

However, just like Gene she was unsure of exactly who the exceptional students were in her classes. Commenting on this lack of communication between regular and exceptional educators, Linda complained:

I'm not really sure who the ESE students in my class are. They gave me a list but I forgot where I placed it. Also, I'm not sure if I have to document them in my roll book.

While the instructional strategies Linda employed in her classroom were totally appropriate to meet the needs of her exceptional students, her not knowing exactly who was an exceptional student robbed her of an important source of information regarding their strengths and weaknesses - the child's IEP and Matrix of Services form. To alleviate this situation Linda suggested:

For inclusion to work we need more involvement from the ESE Specialist as far as the kids go. She needs to go around weekly or at least every two weeks, to check up on the ESE kids. We do need an ESE person to follow these students. And definitely more parent involvement. I've seen only one ESE parent this entire year!

These responses seemed to indicate that communication between exceptional and regular educators at Malcolm X Middle was indeed problematic for Linda. Her lack of knowledge regarding the exceptional students in her class also seemed to indicate a more serious problem as far as inclusion is concerned - a lack of involvement in the placement process for exceptional students. It seemed that Linda was not aware of the IEP's that had been developed for the exceptional student's in her classes, nor did she believe that obtaining that knowledge was her responsibility.

Linda was in complete agreement with Gene on the issue of employing co-teaching as a strategy to include exceptional students in regular classes. Just like Gene,

Linda favored the use of teams to teach small groups of students; however, she was equally dead set against having an exceptional teacher in her class on a full-time basis.

Commenting on the issue Linda declared:

Team teaching? Yes, I like that. But what do you mean about team teaching? Do you mean someone else in the classroom, or the setup like it is now? Have two teachers in the class at the same time? Oh no! I wouldn't want that! I wouldn't want anyone teaching with me in the classroom because everyone teaches differently and everyone has their own thing. I wouldn't mind an aide in my classroom. Someone that could assist the student's while I do the actual teaching. But I wouldn't want another teacher in the room because of the different teaching styles. An aide would be OK because I could tell them what to do and they could assist all the students in my class, regular and ESE.

It seemed as if the issue of territory was as critical for Linda as it was for Gene.

The question of whom would actually be "in charge" of a co-taught classroom remained an issue for these two regular educators.

Linda had mixed feelings on the topic of teachers and professionalism.

Considering herself to be truly professional, she argued:

Yes teachers are professionals. I have a masters degree Teaching is a difficult task and you need training. You have to go through a professional orientation program as a new teacher, which prepares you for what will have to endure in the classroom! I mean personally I'm professional because I have tasks on campus that I'm responsible for. I have to deal with parents in a professional manner. I have to project a professional image in the way I dress. It's a professional job. You have to keep records. You have a very busy day due to all your responsibilities!



However, despite the professional climate that Malcolm X Middle had hoped would be spawned by CMS, Linda had a number of strong objections to the climate that for her actually existed at Malcolm X.

I don't really feel this school always treats teachers in a professional manner. I feel this way because we're always being challenged about what we are doing in the classroom. I feel if someone has spent this amount of time in workshops, in getting a degree, or even just the experience gotten from working with the kids, you shouldn't be treated like you don't know what you're doing. You always have someone watching your back. You have people coming in and out that aren't even administrators checking your role book. Checking to see if you're a good teacher! Checking your classroom management when you don't even know if that person has control over their own class! And you are talked down to. I don't feel teachers here have a say in anything. We're dictated to and it's not up for discussion. Sometimes it's very hard to remain a professional here because you might want to say things that are unprofessional, but you remind yourself to remain calm. You do remember the code of ethics.

It appeared as if the goal of creating a community of self-directed, reflective professionals at Malcolm X was in danger of being thwarted by the top-down, hierarchical structure that coexisted alongside the more collaborative structure envisioned by CMS.

Linda's view of herself as a professional had strong implications for her ability and desire to include exceptional students in her classroom. However, unlike her teammate Gene who focused on his education and experience as sources of strength, Linda focused more on the sensitivity and compassion she had for the exceptional students in her classroom.

Having ESE students in my class? You know, it really depends on the type of the handicap that the ESE kid has.

It really depends on the need of the child. Because a kid could look at me, how professional I am, and they may want or see something better for themselves. They might say--I want to be just like Ms. Jones--you know, have someone to look up to. But then you might have a student that is emotionally handicapped where it really doesn't matter how I portray myself. A lot of kids are into how a teacher treats them. A teacher can be real professional in act and manner and still not have the child like them just because of the way that teacher treated them. When you are dealing with kids sometimes professionalism shouldn't be the only issue. It should also be a personal issue. You need to deal with the children on a more one-to-one basis. So, even though you need to be professional as a teacher, that may or may not help you reach every child.

While not in total agreement with the professional climate that existed at Malcolm X Middle, Linda was still hopeful that change could indeed occur. Believing that the evolving structure and culture of Malcolm X would ultimately enable her to develop professionally, Linda pointed to a number of encouraging signs:

The time schedule is fine. Everything is fine as far as that goes. Staff development is great. Block scheduling is fine. You know in the past there have been some problems with race relations. I think they have improved this year. You really don't see it that much anymore. Since we have this new teaming there is more closeness lately. So I think the staff has been bonding together much better as far as teams go. And spending more time together in staff development also helps. But now it's just the thing as a whole faculty as a whole. We still have that problem. We need more time together as a faculty, to share and link us together.

Obviously, the collaborative atmosphere engendered by CMS had indeed enabled Linda to share ideas with colleagues and allowed her discuss solutions to problems she had in common with other teachers. Although Linda was reluctant to share the territory of her own classroom with another teacher, she seemed to be quite open to the notion of teachers collaborating with other teachers to improve classroom practice.

Linda firmly believed that the structure and culture of Malcolm X Middle had a positive impact on including exceptional students in regular classes. She noted:

Yes, I think this school is ready for inclusion. Really, it's not the school. Some of the students are not ready for it, but the school and staff definitely are. I've never really had a problem with inclusion and I support it here. I feel that the ESE kids deserve a chance to prove they are capable of succeeding in a regular classroom. I know I feel strong enough in my ability to deal with the behavioral issues and modify the curriculum so they would be successful in my classroom. I think a certain number of other regular teachers are ready for inclusion-- if you don't bombard them with five or six at a time. Maybe if you start out with one or two it would work.

On the subject of what additional resources would be necessary for successful inclusion to take place, Linda was in agreement with her teammate Gene - money and materials.

I definitely need extra materials and extra money! Every time we go for supplies here it's like pulling teeth! You see the kinds of kids I have are kinesthetic and they learn from hands-on experiences. I'm a project teacher and it's hard for the kids to get materials to complete these projects. It's always something--either the bookkeeper or department head is out of something. Actually my department head is good about giving me things, but the problem is getting them from the bookkeeper. I would love to do more but I can't because of financial reasons. And it's such a hassle to get materials here! You get things in such limited quantities, so it's hard to do projects."

Linda reiterated her position of not wanting any additional staff to work with her in the classroom. It appeared that Linda and Gene were once again in agreement - teaming would be fine, as long as it remained outside their classrooms.

More people in my classroom? No! I like being alone. I don't like having anyone under me, that I should have to tell someone what they have to do. No. I don't want any

extra person. The teachers on my team, we support each other. If we have behavior problems we can send the student to each other's classrooms as a time-out.

Linda also believed that additional staff training would be necessary if inclusion of exceptional students was to be successful at Malcolm X Middle School. Again, she agreed with Gene that regular teachers needed more information about ESE labels and how they affect student achievement.

I've never really had any training that would have prepared me to work with ESE students. All teachers need to be trained to deal with these students. I mean if you're going to have these students in your class, you really need to know what exactly the problem is with them. You need to know about the different categories that they are labeled with. You need to know how those categories affect them. You need to know exactly what you can expect of them. I have a master's degree and even in college we were never taught to deal with ESE students in our classrooms. In this school we have never gotten any in-service classes dealing with ESE students. Even with CMS, we haven't gotten any training dealing with ESE issues. We need to send teachers to other workshops to get training and see how other places deal with this issue. You know, if inclusion is going to work, teachers here need some staff development so that they will know how to handle outbursts in the classroom, how to modify the curriculum, you know, all that stuff.

Although Linda seemed to support the notion of including exceptional students in regular classes at Malcolm X Middle School, she shared with her teammate Gene a feeling of "otherness" regarding these ESE students. Just like Gene, Linda believed that exceptional students needed to prove that they could succeed in a regular class. Implicit in this position was the belief that exceptional students needs would best be met in special self-contained classrooms until such time that the student proved otherwise. It seemed as if Linda, as well as Gene, was a proponent of the old mainstreaming model of

inclusion. Overall however, Linda was much more supportive of including exceptional students in regular classes than was Gene who preferred seeing these students remain in self-contained ESE classes.

It was quite evident that Linda did not support the notion of co-teaching as a means to include exceptional students in her classroom. She seemed to share Gene's territorial concerns, "Whom would be in charge of such a co-taught class?" Although she would accept the services of an aide in her classroom, the idea of having another adult of equal status in her classroom, was not something Linda wanted to experience. Apparently, Linda as well as Gene supported the notion of team-teaching as long as it remained above the level of their classrooms.

Linda shared the same feeling of being disconnected from the ESE Department at Malcolm X, that Gene spoke of. She felt that she had not been given adequate support in her classroom from ESE personnel and that she lacked sufficient knowledge of ESE labels and the affect they have on student's ability to learn. Unlike Gene, she did not believe that she had been adequately prepared at the university level to deal with exceptional students and the issues that surround them.

Overall, Linda believed that Malcolm X Middle was ready to support increased inclusion of exceptional students into regular classes, if only on a small-scale basis. She felt that the collaborative atmosphere engendered by CMS enhanced the possibility for increased inclusion to take place. Linda believed that CMS might also allow for the increased staff development she thought would be necessary for inclusion to be successful at Malcolm X. Linda, as well as Gene took full advantage of the time benefits allowed by block scheduling. Both regular teachers used alternative instructional

techniques and strategies in their classrooms. Cooperative groups, peer tutoring and the breaking down of large lessons into smaller, more easily comprehended mini-lessons were features of both teachers' classrooms.

Linda was obviously concerned with behavior as an issue affecting inclusion at Malcolm X Middle. However, unlike Gene she believed that the behavior of students was a school-wide concern, that even though the behavior of ESE students in her class was not acceptable that it was no worse than the behavior shown by many of her regular students. Although behavior was a problematic issue in her classroom, Linda believed that academic factors played a far greater role in the success of her included students.

Finally, financial resources and adequate materials were areas of concern for both regular educators. Linda as well as Gene complained of inadequate supplies of books and other materials in their classrooms. Both teachers felt this lack of supplies hampered their efforts to provide all students in their classes with the experience of learning in a more multi-sensory, hands-on manner. Table 7 presents a summary of Linda's perspectives on inclusion.

Table 7

Linda's Perspective on Inclusion

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- Moderate supporter of inclusion of exceptional students.
- Believed the educational needs of exceptional students would be better met in self-contained classrooms.
- Adhered to outmoded mainstreaming model of inclusion.
- Believed student had to prove academic readiness to be included in a regular class.
- Did not believe in team approach to classroom instruction. Did not support co-teaching or collaborative consultation. Would accept assistance of paraprofessional.
- Preferred to be the lone teacher in class due to issues of power and territory.
- Complained of lack of support from ESE department. Wanted more information regarding exceptionalities and their effect on student achievement. Did not feel that she was fully prepared to teach exceptional students.
- Believed school was ready to include a small number of exceptional students. Did not want regular teachers to be overwhelmed by large numbers of students.
- Believed that CMS facilitated the inclusion of exceptional students.
- Used instructional strategies that were appropriate for her included students.
- Believed that academics played a far greater role than behavior in inclusion.
- Complained of inadequate supply of books and materials.

## Teacher Perspectives: The Exceptional Student Education Teachers

### Karen's Perspective

Karen was a young, African-American exceptional education teacher who exuded enthusiasm and competence. Articulate and well versed in current trends in exceptional education, she was definitely a valuable resource for the entire ESE department at Malcolm X Middle. Karen had been working on her Masters degree at a local university, majoring in Exceptional Student Education. In partial satisfaction of her final practicum, Karen was in the process of developing a resource guide for teachers who have exceptional students in their classrooms. Her current position, OCR Class teacher, was the second she has held since coming to Malcolm X Middle three years ago. Her first position at Malcolm X was as a seventh grade Varying Exceptionalities teacher. Karen was definitely pleased with her new teaching assignment. Her undergraduate work had prepared her to work with students classified as being mentally handicapped and she had always expressed a desire to work with these students at Malcolm X Middle if the opportunity arose. Her work at the university had encouraged her to be a strong proponent of including exceptional students in regular classes. So when the district "placed" an OCR class at Malcolm X Area, she seemed to be the ideal candidate to facilitate its implementation.

Karen's room was much smaller than most at Malcolm X. Actually it was half of a larger room that had been made smaller by a folding room divider. The other half of this larger room was occupied by the seventh grade VE Class. Although Karen only had



twelve students in her class, when she and both teacher assistants were present, the room did feel crowded. The room was "busy" but neatly organized, contained twelve desks, two tables and a study carrel. This assortment of seating areas allowed Karen to provide her students with different learning experiences; group instruction, individual instruction and cooperative learning. One entire sidewall was covered by a whiteboard, while the opposite wall contained a bulletin board, as well as another whiteboard. The rear of the room contained a large storage closet, a shelving system with ample space to display texts and other materials, and a kitchen-like cabinet and counter unit into which a sink had been added. Unlike most other rooms at Malcolm X, Karen's was definitely equipped to provide students with the hands-on experiences recommended by many teachers. Abundant visuals covered the walls in Karen's room. Unlike those in the regular education classes that emphasized academics, the visual aids in Karen's room emphasized behavior and functional skills. A behavior system consisting of rules, consequences and rewards was prominently displayed. The remainder of the visuals consisted of a schedule of the day's events, an oversized monthly calendar, and various safety signs as well as a number of student products.

Three things struck you when you spent some time in Karen's class, the high degree of structure, the ample support provided to the students and the abundance of instructional materials. The use of visual clues provided her students with the structure necessary to begin and complete tasks. It also allowed them to anticipate what tasks were coming up so that they could organize and direct themselves with a minimum of adult assistance. Many of these visuals consisted of words and pictures, as many of Karen's students were severely disabled and had not yet mastered the alphabet. The entire room

served as a resource for her students, extending lessons and concepts far beyond the confines of a textbook.

The low student-teacher ratio was another striking feature of the OCR Class. Unlike other ESE classes at Malcolm X, it was capped at a four to one student to staff ratio. The luxury of being helped by two teacher assistants certainly allowed Karen to deliver lessons that were appropriate and individualized for her students. This high degree of support enabled flexibility in the presentation of materials being taught to students. At times there were group lessons with Karen delivering the curriculum while the two TA's circulated around the room answering student questions. At other times the class was broken down into two or three groups, each working on curriculum appropriate to their developmental level. This situation was definitely a stark contrast with regular classes and other ESE classes as well, in which additional human support was minimal.

The amount of instructional material available in Karen's class was also remarkable. Given additional funds by the district, Karen was able to purchase materials that allowed her to provide students with ample opportunities for hands-on learning activities. For example, after a lesson that focused on money skills Karen's students were able to handle play money resembling real currency and operate an actual cash register. The low number of students coupled with adequate staff and materials made this a pleasant and rewarding experience for everyone involved. As might be expected, Karen was extremely enthusiastic about inclusion believing:

Inclusion gives special education students the chance to go into the mainstream in a setting with regular students in the general education population with support. With inclusion students would leave self-contained ESE classes and move into regular education classrooms. They need support,

either from an ESE teacher or a resource teacher, or the regular education teacher getting some kind of special training in special education so she can modify their work. Inclusion is definitely not sending ESE students into regular classes to "sink or swim" without some type of support.

Perhaps the most important distinction in Karen's definition of inclusion was her emphasis on providing support to students being included in regular classes. Her conception of the process moved her a step beyond the mainstreaming model currently in place at Malcolm X Middle.

Karen was quite pleased with the structure that block scheduling and CMS provided for her everyday life at Malcolm X Middle. On the subject of block scheduling, Karen explained:

I like block scheduling because it gives students more time in the subject areas and it gives the teacher more time to work individually or in groups. Then you can come back and go over what you learned each period because it's longer than the normal sixty minutes. So the extra 30 minutes is helpful but being that my class is self-contained it doesn't really affect me. If I wasn't in block scheduling I could still block things myself, how I wanted to do it anyway. So it's helpful. It's also helpful because we have time during the day to do extra staff development. It allows you a lot more flexibility. Teachers can still teach the 60 minutes they used to have, but 90 minutes gives you 30 more minutes in which you can review, close the lesson up and sum it up. The students can work in groups or individually, so I still think it would benefit me if I wasn't self-contained. The students need more time and that would give us more time to work with them and give them more time to interact with their peers.

Apparently in the case of block scheduling, what was an innovation for regular educators was nothing more than business as usual for exceptional educators. Karen's previous experience with structuring her self-contained ESE classes made her quite

comfortable with the change to block scheduling at Malcolm X Middle, something that the school's regular teachers had just begun grappling with.

Karen was quite appreciative of the opportunities that CMS provided for meetings and staff development.

I like for the middle schools, but again I'm self-contained so it doesn't affect me too much. What I like about CMS is that it gives you a certain amount of hours each week that we can have for staff development, meetings and it is incorporated into the school day so we don't have to come to work earlier or stay later. Like some schools have faculty meetings every Monday at four o'clock after school. The teachers here have a chance to arrange their schedules to attend these meetings. With everything within the school day it gives us time to do other things. It's not cramping our styles! Before CMS we had to go to meetings either before or after school. What I don't like about it is the Critical Thinking block which lasts for 30 minutes. To me it's almost a waste. The school didn't design a curriculum, so you can do whatever you want during those 30 minutes. It was supposed to be focused on reading, but we do reading anyway. So it was just something extra thrown in there.

The ability to meet during normal school hours to attend to the mountain of paperwork that ESE regulations create was a relief to Karen and all the other ESE teachers at Malcolm X. Previous to the structure imposed by CMS, they had to schedule IEP meetings in the morning before school started or during their planning hours, interfering with their ability to prepare lessons for the next day's classes. The ability to schedule IEP meetings during the school day had become a critical factor in the success of the inclusionary process at Malcolm X since regular teachers were finally obligated to attend these meetings. Having sufficient time built into the school day to accomplish this

important planning and placement process certainly facilitated the inclusion of ESE students at Malcolm X.

When asked to describe what instructional practices might have a positive impact on exceptional students in regular classes, Karen response was quite definite.

I think cooperative grouping and peer tutoring would have a positive impact because students tend to feed off each other. The ESE student would always have someone, like a regular student to assist if they have a question. They wouldn't always have to depend on the teacher, especially if the teacher was busy at the moment, maybe their peer could answer the question for them. In cooperative groups the student could record or be the monitor of the group and still feel they are participating. You really don't have to require them to be on the same academic level of the regular students. I would use peer tutoring to assist the students in completing assignments. Some of the regular education students would probably finish earlier than the rest of the class and they can sort of peer tutor the other students. I find that students learn a lot from each other. So that's a definite practice that can benefit ESE students.

Karen was equally emphatic when asked to describe instructional practices that had negative impact on exceptional students in regular classes.

A negative impact? I think seatwork! Do this ditto! Go sit down! Don't bother me now! I'm saying that seatwork, or individual work, sometimes causes students to have a problem. When you ask an ESE student to complete an assignment on their own, even with guidelines, they have problems finishing.

It seemed that Karen was comfortable with teaching strategies such as peer tutoring and cooperative learning that not only worked well in ESE classes, but that also helped regular educators deal with the pressure put on them by the increasingly heterogeneous nature of their own classrooms. Karen also agreed with Gene and Linda's

view that individual seatwork was detrimental to the success of ESE student's in regular classes.

Karen's response to what a typical day in her class was like revealed some important differences between her class and the regular classes at Malcolm X Middle. Not surprisingly, since Karen's class was a model designed and implemented by the district, it was also distinctly different from the other ESE classes at Malcolm X as well.

A typical day? Well we do Community Based Instruction (CBI) on Tuesday's, Wednesday's and Thursday's. With CBI I organize different locations in the community that we can go to learn the same skills we are working with in the classroom. It gives students a more hands-on approach. We go to Snyder park, Publix, Blockbuster and also to the Broward Mall. We go these places between the hours of 9:30 and 12:30 and the students practice different skills. Transportation is provided by the Broward County school system so the students don't really have to pay for anything. We have a checklist so we can check off the skills that we are working with and the students get grades of pass, fail, or emerge foe each particular skill. That way the skills we are working on in class extend out into the community. For example, Monday is a preview day where we look at what we're going to do during the week. Then we go out into the community and get a chance to do it. In the afternoon we follow up on it and by Friday we have some type of closure. Also, I definitely consider CBI to be a form of inclusion because we are taking students out into the community which is the larger setting they need to feel comfortable with once they leave school or graduate. CBI gives them a chance to interact with the population in their setting which is the community.

Karen's class seemed to provide students with the maximum opportunity to learn using a hands-on approach and did so in a real-world setting. This was certainly more than could be said of the ill-equipped regular classes and even of the other self-contained

ESE classes at Malcolm X Middle. Speaking of classes actually held at Malcolm X

Middle, Karen described:

In a normal day we follow our schedules starting off with a journal prompt. Then we do math, social studies, critical thinking, language arts and science. Most of the assignments are guided by the teacher or the teacher assistants. Then the students go to their elective classes with the support of the teacher assistants. These teacher assistants play a vital role in offering support. They do some instruction with the daily lessons and they monitor the student's behavior. Sometimes they take the students on CBI trips, or they take them to the media center or assist them with their class work.

It seemed as if the additional financial and human support provided by the district was a crucial factor in the flexibility of instruction provided by this inclusionary class. The luxury of having two teacher assistants in her classroom and the money supplied by the district to implement her CBI curriculum allowed Karen to meet the individual needs of all her students to a degree impossible to match in most other classes at Malcolm X Middle.

Contrary to the views of the regular educators in the study, Karen was a proponent of co-teaching as a means to facilitate inclusion at Malcolm X Middle.

Co-teaching? I think it's great because you have two teachers who are hopefully both skilled and compatible, so they work and feed off of and support each other in achieving the goal, which is to teach all children. I see co-teaching as a regular educator and special educator working together where the roles are equal. The special educator might be more of a modifier or accommodator. They have the background to modify the lesson the regular teacher is working on and can work with ESE students or regular students who are borderline in academics, that are not labeled ESE but need extra help. All the while the regular teacher can go along with the regular group and support

them with their assignment or answer questions that they have.

Reiterating her stance that successful inclusion required exceptional educators supporting regular teachers in their classrooms, Karen argued:

When you say inclusion needs extra support if it's not actually in the classroom, like co-teaching, that support might not really be there. If you say it's co-teaching that support will be there everyday and that students won't have to wait until the support teacher shows up to pull them out or help them for a bit in class. I think parents will feel comfortable knowing that two teachers are in the room and one is certified in special education and is able to give students immediate support. I really don't see support any other way!

Karen provided additional insight into the co-teaching process, calling for more shared responsibility between regular and exceptional educators for all the students at Malcolm X Middle.

When you talk about what teacher would be responsible for the students, I would say both are responsible. We need to start thinking of them as "our" children, not regular and ESE children. Most of the students at this school are borderline as far as schoolwork goes. They probably didn't get placed in ESE because of the time of day or whatever. Maybe if someone else tested them, they would be labeled ESE! So it's hard to say, but I feel as if the students should be shared equally, there shouldn't be regular education and special education. The point is these students need help however we can give it to them. I think a good teacher is a good teacher and I think the two teachers could feed off each other. Hopefully, the students will learn because I know from experience that you would probably be surprised what an ESE teacher can bring into the regular classroom. That regular teacher might be lacking the strategy that the whole group could benefit from.

Karen's radical viewpoint on this topic was diametrically opposed to that held by Gene as well as Linda who both rejected the notion of having an ESE teacher in their



classrooms. It would seem that if support is going to be provided to exceptional students in regular classes, additional conversation between regular and exceptional education is in order.

Karen considered teachers as being professional because:

They have to go through a thorough training process, they have to meet state qualifications, and apply for a certificate. Teachers train all the other professions! Everyone goes through school and teachers are involved in the formative years of everyone's education. And teachers make a difference. Teachers are held in high status because they deal with students everyday. They have a high responsibility. They are accountable. Teachers are definitely professionals!

Karen was equally sure about the professional status of teachers at Malcolm X Middle.

Teachers here are treated as professionals because they have lots of responsibilities and are held accountable for different things. They also have the opportunity to do their own thing. By that I mean they have the opportunity to have their own class and make their own decisions most of the time. They're responsible for close to a hundred students in regular classes, and while ESE classes are smaller, they are still responsible for a group of students. That's the job they do day in and day out.

Karen firmly believed that the organization of Malcolm X enhanced her ability to act in a professional manner.

I think it enables me because of all the staff development. We get a chance to talk together as a team. We get to discuss different things we have in common. And we have in-service two times a week. That training lets us learn the newest technology and reading strategies. It improves our ability to teach.

Apparently, Karen appreciated the new, more collaborative and knowledge oriented atmosphere that CMS had brought to Malcolm X Middle.

Karen was less positive about the effect that cultural attitudes at Malcolm X Middle had on her ability to grow professionally.

A lot of people here have different views on ESE teachers. I feel as if I'm an advocate for ESE! Sometimes I feel a lack of support from administration. In looking at long range goals, where we want the ESE department to be down the road, is not part of their agenda. It's not at that level yet. So as a teacher it sort of causes me to go with the flow. Instead of wanting to say, or causing confusion, that's what I do. Still I feel as if this is an excellent place for inclusion even though the staff and administration are not up to that level yet.

Karen's views once again seemed to be at odds with those of Gene and Linda who thought Malcolm X was ready for inclusion, at least on a rudimentary level. Asking for an explanation of her seemingly contradictory feelings about school readiness and staff readiness towards inclusion, Karen argued:

I feel that way because this school is critically-low, a lot of the test scores are low, and the students in regular classes are functioning at a low level anyway. So teachers have to modify the work anyway because a lot of kids can't read the books. So if the regular students are already functioning at this lower level, why not establish an inclusion program where the ESE students can blend into the mainstream? In that way a co-teaching setup could have the special educator not only benefiting ESE students, but also modifying the curriculum for those students who are already falling through the cracks and need some extra help.

So for Karen, the attitudes that regular education teachers had towards ESE students and teachers were definite impediments to successful inclusion at Malcolm X

Middle. Karen had strong opinions regarding how teacher's views of themselves as professionals affected their ability to include ESE students in their classes. She argued:

I think if you don't understand the concept of inclusion and are not really willing to change, then of course you will have negative feelings towards it. But I feel as if it's something that I am strongly passionate about. I'm into inclusion because it would benefit the whole child. It's not just something that would bring more funding, but really, you have students in situations that are not the best for them. I can also add that a lot of teachers here feel as if they are not trained to teach ESE students. They think it's so much different! I hear that a lot in staff development meetings. But my thing is that they're already dealing with low performing students and they have to modify the work, so basically it's really the same. It's just that their students aren't labeled ESE. Sometimes I think that regular teachers think we ESE teachers have some kind of "magi bullet." I think with training and actually setting up some types of workshops the teachers can learn more about ESE, the different laws and things. Maybe then they will accept them better. But right now they are in a different place.

Karen's deeply held conviction that inclusion would be beneficial to all students at Malcolm X Middle was definitely at odds with its lukewarm acceptance by both Gene and Linda. In addition, it seemed the perception that exceptional and regular education had a communication problem at Malcolm X Middle was one held by exceptional as well as regular educators. Karen believed that regular educator's views that exceptional educators were somehow better able to deal with ESE students were not founded in reason and actually represented a serious threat to successful inclusion at Malcolm X Middle.

Considering the additional human, material and financial support that Karen received from the district for the OCR Class, it is not surprising that when asked what resources were necessary for including exceptional students in regular classes she

focused mostly on instructional strategies such as organizers and peer tutoring. This was unlike the regular teachers who thought they needed more money and materials.

According to Karen:

I have support from the district Office. We have a program specialist that came in and helped set up the classroom. I have two teacher assistants that are here full-time, so one can stay in the class while the other goes on CBI trips or to the kids' electives to support them. So I feel as if the support for my class is excellent. Besides human support, we have financial support too. We have \$6,000 to set up the classroom and \$3,000 for technology and supplies. That helped us purchase a lot of items. We still have some left over so we can order more next year. I also get supplies from my department head and in the beginning of the year we got \$250 from the state to order materials. Yeah, it's excellent!

It seemed as if Linda and Gene's recommendation that more money and more supplies might indeed be critical for inclusion to succeed was valid indeed if we use Karen's class as a guiding example.

Karen was definitely a strong and vocal supporter of including as many exceptional students in regular classes as was possible. Although she recognized the need for some self-contained classes to meet the needs of exceptional students, for example her own class and the behavior class, for the most part she believed that exceptional students should first be placed in regular classes before the option of a more restrictive environment was considered. This more inclusive model certainly conflicted with the mainstreaming model used by Gene and Linda. From Karen's point of view, exceptional students did not have to prove they were ready to be placed in a regular class. Rather, the onus of proof was put upon the school to explain why these exceptional students should not be included in regular classes.

Karen was also an avid supporter of co-teaching as a means to include exceptional students in regular classes. She did not seem to be concerned with the territorial issue of who would be in charge of the class that was of such great concern to Gene and Linda. Instead, Karen focused on the positive points of co-teaching--the sharing of ideas, the feeding off of each teachers strengths, and the increased ability of both teachers to reach all students in the class who might need additional assistance. For Karen, if additional support were to be provided to exceptional students, it would given be at the classroom level.

Communication between regular and exceptional educators was as much a problem for Karen, as it was for Gene and Linda. This miscommunication resulted in Karen's feeling disconnected from the rest of Malcolm X Middle. She definitely felt that the problems of exceptional students were not on the schools agenda. Karen also felt the misperception held by regular teachers that exceptional educators somehow possessed special teaching skills only served to widen the gulf between the two groups of teachers.

Overall, Karen was unsure about Malcolm X Middle's readiness to include exceptional students in regular classes. Karen believed that the structure provided by CMS allowed teachers to get together and discuss mutual areas of concern and also provided them with greater opportunities for staff development so that they might improve their teaching abilities. However, Karen also believed that the culture of Malcolm X Middle supported the gap in understanding between regular and exceptional educators and that this gulf was wide enough to prevent the successful implementation of inclusion at the school.

Karen's use of alternative instructional strategies such as cooperative learning and peer tutoring and her level of comfort with the additional classroom time imposed by block scheduling seemed to correspond with the structures in place in both Gene and Linda's classrooms. It seemed as if both groups of teachers appreciated the extra time they had to spend with students and used similar teaching strategies to maximize student achievement in these longer class sessions.

Glaringly absent from my conversations with Karen was any mention of behavior problems, either in her class or on a school-wide basis. What seemed to be an important issue for both Gene and Linda did not affect Karen to any substantial degree. Perhaps the low teacher-student ratio or the abundance of hands-on materials prevented students from misbehaving in Karen's class. However, it seemed as if behavior was really a non-issue in Karen's class.

Finally, Karen was extremely satisfied with the level of support that she had received in her classroom. She certainly had adequate funding to implement the curriculum in her class; as well as to buy the materials that she thought were necessary to meet her students' individual needs. In addition, Karen was appreciative of the generous human support in the form of teacher assistants and program specialists that the district had provided for her classroom. Table 8 presents a summary of Karen's perspectives on inclusion.

## Bob's Perspective

Bob was a gregarious, African-American eighth grade Varying Exceptionalities teacher. This past year had been his first as a teacher and like many "rookies" he was bursting with optimism and energy. He was extremely anxious to perform to the best of his abilities and did not hesitate to seek the assistance of other more experienced teachers when the need arose.

Bob's room was similar to Karen's in size as well as the fact that it was actually half of a much larger space. It was located in what was intended to be a computer lab for the Science Department. This lab had been separated by a folding wall similar to the one in Karen's room; with the Gifted class occupying the remaining space. I hesitate to use the term room to describe this space, as it really didn't feel like one at all. Unlike other classrooms at Malcolm X, Bob's "room" was cold and sterile, as a lab might be expected to look like. There were no carpets and the lighting was much harsher and brighter than in other places on campus. Two long counters, originally designed to hold computers, lined the length of the two sidewalls. A small window in the door was the only means of letting natural light into the room, so the atmosphere inside might best be described as artificial. There were no bulletin boards where Bob might display student works and the whiteboard in the room was barely adequate to contain the contents of a single lesson. The placement of the counters forced students to sit quite close together resulting in a somewhat claustrophobic arrangement. It was quite obvious that Bob's room was not really conducive to teaching and learning. However due to the overcrowded conditions

that existed at Malcolm X Area, any space that possibly could be, was pressed into service as a classroom.



Table 8

Karen's Perspective on Inclusion

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- Strong supporter of inclusion.
- Believed that most exceptional students should be included in regular classes with the exception of those who had severe academic or behavioral problems.
- Did not believe in proof of readiness for inclusion on the part of exceptional students. Rather, school needed to prove why these students should not be included in regular classes.
- Avid supporter of co-teaching as an instructional strategy to include exceptional students.
- Felt there was a lack of communication between regular and exceptional educators.
- Believed school was structurally prepared for inclusion, but did not believe that inclusion was on the school's reform agenda.
- Did not mention behavior as an issue for including exceptional students.
- Extremely satisfied with the level of human and material support the school and District had provided in her classroom.

Being a first year teacher, Bob seemed to be unfamiliar with much of the jargon that educators use. When asked to tell what he knew of inclusion, he hesitatingly replied:

Well my interpretation of inclusion is that everybody is included in whatever effort is being made to teach. Whatever, disabled, denomination, racial, religious and everything. These groups would be included. Whatever the makeup of the ESE students they would be included, no one would be left out. Something might have to be done to accommodate them, but they should be included regardless of their disability. Should exceptional students be included in regular classes? Yes I think so. Those who can cope should. To me ESE means sometimes students are educable like regular students. Some students are not so educable; they might have emotional problems and need a self-contained classroom. But others are not like that. So depending on their particular problem some may need to remain in an ESE class and others may not.

While Bob may not have had a handle on the terminology that educators used to describe the inclusionary process, he was certainly aware of the need some of his students had to be included in regular classes.

Like other participants in the study, Bob supported the use of block scheduling at Malcolm X Middle.

I prefer block scheduling because at least I don't have to deal with settling the kids down five times a day! Once I get them settled in then it's up to me to decide how I will run the class. It definitely provides me with a lot of flexibility. The other way when they come in every hour I can't teach because you spend five minutes settling them down and before you know it, it's time to leave.

It would seem that as a novice, Bob preferred the use of block scheduling for a different reason than the other participants - behavior. In a school such as Malcolm X Middle with its emphasis on security, that may not have been such a small consideration.

Bob also linked behavioral concerns to his approval of co-teaching as a means to include ESE students in regular classes.

Co-teaching? You mean two teachers in the same room? I would go along with that because I have a group of students where basically one group is trying. And I have another group that is not interested at all. So sometimes I have to separate them because it is not fair to those students who are trying. I'm constantly being interrupted by those who are not interested. Perhaps if there were two teachers in the room, the interested kids would definitely get more attention.

Bob continued to emphasize behavioral issues when he was asked to describe a typical day in his classroom.

Well, when I go to class I would say that the first 10-15 minutes I spend just trying to settle them down to do some work. If I have handouts, I'll give them to the students and explain what it is they have to do. I'll tell them to pay attention and start their work. I ask them if they have any problems to please raise your hand and ask for help. If it's new subject matter I will use visuals and overheads to try and tell them more about it. It's just that their behavior is such a problem!

Bob firmly believed that his student's behavior would prevent them from being successful in regular classes at Malcolm X Middle.

Is behavior an issue for including ESE students in regular classes? Yes! Number one they will be disturbing those regular classes. If you have a regular class, in order to teach you have to have a certain acceptable level of behavior from your students. If the ESE kids in those classes are going to be outrageous, they will be very distracting. I don't think all ESE students will act like that, but I guess if you are going to decide who will be in regular classes you should really think about behavior. You would have to look at suspensions and other teacher recommendations. Really behavior is a deciding factor for me when you speak of inclusion. If you send students into regular classes and they have this, "I don't care attitude";

you are going to destroy that entire class. I really couldn't recommend putting this "hard" group in regular classes. They are just very disruptive!

Since behavior of exceptional students seemed to be such an important issue for Bob, I asked him to tell me what types of problems these students caused in his classroom.

They don't care! I tell them to sit--they just sit for two minutes and then they continue. They curse, they throw things. No matter what I do, it's like they just don't care. For example, I had a problem the other day. This student was cursing in class and I said--OK. That's it! So I wrote a referral to his administrator and a half-hour later the student was back in my room! Obviously even office referrals don't affect these students. When that student comes back into the room and brags to his peers--See? I'm back and nothing happened! --They just get to see that they can do whatever they want and it won't affect them in any way. You know, all my students are not like that. I have about five or six out of fourteen students that I'm talking about. The rest of the students could probably be included in a regular class. But for the most part, at this school behavior is a major issue for including ESE students in regular classes.

Although Bob was disheartened by the severe behavior problems that some of his students caused in his classes, he remained hopeful that other ESE students would benefit from being placed in a regular class at Malcolm X Middle.

I think it's good for some students. As I said, you need to separate them in terms of behavior. I really think the students will try to "move up." If they are in a class where other children are learning, it will cause them to want to learn too. It's just that these students have so many problems. For example, when I take my kids to lunch they don't want to be seen with me because they have the perception that I am an ESE teacher. Their not wanting to be seen with me tells me something. I really think they are ashamed of being in an ESE class. It means that there is something that they would like to change. They really

would like to get out of ESE classes. You know they have told me that over and over. They don't want the rest of the school to know that they are ESE students. That tells me something is there, that not all is lost. This really tells me there is some ambition!

While still focused on the issue of behavior, Bob acknowledged that academic problems also played a part in including exceptional students in regular classrooms at Malcolm X Middle.

Most of the kids really don't want to work here. Some will try, but if they think they can get away with not doing anything they would. Somehow they think that somewhere down the road that everything will be fine. They don't really have to do anything. Someone will take care of things for them. You know they can't even read. That's the biggest problem. Everything I put on the board I have to point out and show them. They can pronounce some words, but they have no comprehension. I think this a problem for the entire school. I hear other teachers, regular teachers, complain of the same thing. Sometimes I listen to my students and they can hardly say the word house. They ask me--What's that word? --I mean at their level they can hardly make out normal words. I have to spend the entire class trying to help them pronounce the words and by the time we finish the lesson, they don't even remember the main idea of the lesson. I mean reading is important, but behavior is the most important issue. The lack of reading can hopefully be addressed. But if you go into a classroom and the students show outrageous behavior, you really can't address the reading problems they have. First, we have to pay attention to the behavior issue. It is the number one issue!

While it might be said that Bob's focus on behavioral issues was simply a reflection of his relative inexperience as a classroom teacher, this same issue was of prime concern to other participants in the study as well. Although Bob made little reference the effect that block scheduling and co-teaching had on academics, he was quite

sure that both strategies would be helpful in controlling the inappropriate behavior of students at Malcolm X Middle.

As far as Bob was concerned, the best instructional strategies for working with ESE students in regular classes was the individualization of their work and giving them as much one-on-one attention as possible. When asked how it would be feasible to provide such attention in a class that may have contained over thirty students, Bob replied:

Well, if there was an aide in the class you might be able to separate them, even though you don't like to. You really don't want to show an obvious demarcation between ESE and regular students. But that way you could give them more attention. When you give them something to do you can pay closer attention and monitor exactly what they are doing. They could work with other students too and that would be a way not to point out the ESE students. You know you have to keep their attention at all times. You have to responsive to their questions. And you really need to monitor their progress with the assignment and give them regular feedback.

It seemed that Bob was in agreement with both regular teachers by suggesting additional human support was necessary when including exceptional students in regular classes. The form he suggested, an aide, was something that both Gene and Linda also agreed would be helpful in their classrooms.

Being a first year teacher, Bob had a rudimentary conception regarding teachers as being professionals.

Well I would consider teachers to be true professionals because they practice their art with a special body of knowledge. Not only do they have special knowledge, but most times they have been taught how to deliver that information. They have been taught how to get the students attention, which is very important.

When asked if Malcolm X Middle treated its' teachers in a professional manner, Bob once again linked the issue to the behavior of students on campus.

Personally I don't have too many complaints. However, sometimes you are expected to look over, or treat certain things with less gravity than you might like. For example, if a student is disrupting the class you don't get the backing you might like in dealing with that student. I don't think that the administrators, from what I am observing, tend to be very helpful to teachers when you complain of a student's behavior. It's like, well you know, when a teacher complains about that student it's because they are disturbing the learning environment in the classroom. I feel that my own professional opinion about the situation in my classroom is sometimes not taken into account.

In such an instance Bob felt that administrators not taking a teacher's professional opinion of the classroom environment into account, robbed them of their status as classroom leaders - a feeling that was not uncommon at Malcolm X Middle.

Overall however, Bob believed that the organization of Malcolm X Middle was conducive to his own professional growth.

Well despite my limited experience I think block scheduling is good because I have more time to decide what to do with my students; whatever I want to do, or however I want to structure my class. Also, the regular meetings allow you to get new information that you can take back to your classroom. It makes me better able to impart the knowledge I have. It also gives you sufficient planning time to develop things. That helps you to be a better teacher, to be a better professional. All in all the structure has a positive impact on teachers. I think if you are really interested in teaching, this school makes an effort and you can have a positive impact on your students.

It seemed that the collegiality and access to information that CMS provided was definitely helpful in the formation of a more professionally minded staff, perhaps especially so for new members of the profession such as Bob.

Bob was of the opinion that the structure/culture of Malcolm X Middle did indeed have a positive impact on the inclusion of exceptional students in regular classes.

Well I have not experienced anything negative on that account. The ESE Specialist constantly asks me are there any students that I think belong in regular classes. So I believe that people here do support the idea of inclusion. I think the school is organized to accept and help ESE students in regular classes. Block scheduling certainly helps the process.

Due to his status as a first year teacher, it was hard for Bob to comment on the effects the school's culture had on the inclusionary process at Malcolm X Middle. However, Bob seemed to feel that at least structurally, the school was adequately prepared to include exceptional students in its regular classes.

Finally, Bob had mixed reactions regarding the issue of support provided to his classroom.

Generally I would say that I have enough materials to meet my students needs. I speak with other teachers and they are happy to give me materials to use in my class. You must bear in mind that my students are not regular, so even though they are in the eighth grade, they are really functioning like fourth or fifth grade students. As far as human support in my classroom, I have an aide that comes into classroom for an hour and a half per day to help with the kids. It's really not enough. Not enough. But I try to do with whatever I have. With my type of class I could use an assistant all day long.

Like Karen, Bob felt that he had adequate materials to teach to the different academic levels that students presented in his classroom. However, he was less than



pleased with the human support given to him by Malcolm X Middle. On this point he sounded more like the regular educators who believed additional support in the form of an aide would be necessary for all students to be maximally successful in their classes.

While Bob supported the notion of including exceptional students in regular classes, his model had more in common with the regular educators than with the model envisioned by his ESE colleague. Unlike Karen who felt most exceptional students should be placed in regular classes, Bob firmly believed that exceptional students needed to prove they were ready to be placed in a regular class. In addition, unlike Gene and Linda who stressed academic factors for mainstreaming exceptional students, Bob felt that behavior was the primary issue for successful inclusion. Unlike these regular educators, Bob viewed behavior as primarily a classroom issue rather than a school-wide issue, and as such it represented a formidable barrier for students in his class to overcome if they were to be considered candidates for regular class placement.

Bob's views on co-teaching and block scheduling were more in alignment with Karen, than with the regular educators in the study. Like Karen, Bob supported the use of both measures for the successful inclusion of exceptional students in regular classes. However, his insistence that they be used primarily for behavioral reasons was counter to her emphasis on the academic benefits they bestowed on a classroom. His view on both measures certainly was at odds with both Gene and Linda who felt behavior was a school-wide issue and therefore had little relevance to including exceptional students in their classes.

Even though Bob's vision of inclusion might be characterized by a distinction between regular and exceptional education, he was well aware of the emotional impact

this separation had on his students. His description of students not wanting to be seen with him because of the negative feelings this association aroused seemed to be at odds with his strict "conditions" for his students to be placed in regular classes.

Overall, Bob believed that Malcolm X Middle was indeed ready to include exceptional students in its' regular classes. He felt CMS, with its' stress on collegial problem-solving and provision of adequate staff development enhanced the possibility of successful inclusion at Malcolm X Middle. He also appreciated the flexibility that block scheduling provided him in meeting the individual needs of all his students. Finally, Bob felt that Malcolm X Middle provided him with sufficient material support in his class, however human support seemed to be less than adequate to meet his needs. Table 9 presents a summary of Bob's perspectives on inclusion.

### Jane's Perspective

Jane was a young, Caucasian ESE teacher in charge of what some considered to be one of Malcolm X's more challenging classes. Her class consisted of students that had been identified by other staff members as being so behaviorally complex that they required a self-contained class in order to be successful in school. Perhaps it was the stress and tension of the class that caused Jane to appear serious-minded at most times. Or perhaps her serious demeanor simply reflected her dedication to teaching. In addition to her duties as a classroom teacher, Jane coordinated Malcolm X's new teacher professional orientation program. She was also in the process of becoming acquainted with the role that an ESE Specialist played in the school as Catherine, the ESE Specialist,

planned to relocate to Orlando at the end of the year and Jane had been chosen as her replacement by administration. Jane would bring a breadth of experience to this position as she has held a number of ESE positions since coming to Malcolm X three years ago. Jane came to Malcolm X Middle from Long Island, a suburban area adjacent to New York City, where she had been a special education teacher in an elementary school. Her first position at Malcolm X was that of a seventh grade VE teacher. Her second year found Jane co-teaching a class of students labeled Educable Mentally Handicapped.

Table 9

Bob's Perspective on Inclusion

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- Moderate supporter of inclusion.
- Adhered to outmoded mainstreaming model of inclusion.
- Bob's perspective very similar to regular educators. Believed that students needed to prove academic and behavioral readiness to be included in regular classes.
- Believed that behavior was the primary issue for inclusion of exceptional students.
- Supported a team-oriented approach towards instruction. Felt a co-teacher could assist with behavioral problems in regular classrooms.
- Extremely aware of the effect of exceptional labels on student's self-worth and esteem. Believed that most exceptional students really wanted to be included in regular classes.
- Believed that school was structurally ready to include exceptional students. Felt the collegiality and training provided by CMS enhanced teachers abilities to include exceptional students. Believed that block scheduling allowed him to better meet his students needs.

Jane was strong proponent of including exceptional students in regular classes at Malcolm X Middle. According to Jane:

Inclusion means unifying special education classes and regular education classes in the least restrictive environment. It means putting the special education population in with the regular population so that they aren't just in self-contained classes. You know ESE kids are really more regular than they are special. I think inclusion is ESE kids working together in groups. And the teachers also. Teachers really have to learn to work together and challenge their interests. Sometimes when a special education teacher and regular teacher work together they have more ideas. They stimulate each other and motivate the environment. Inclusion means two teachers working together in the same room. Really, we're all the same even though we're special education and regular teachers. We're just teachers that have different titles. It's like a team approach. There's no labeling the teachers as regular ed. or special ed. You know if a class didn't know that when they started the semester, I doubt the children would even know that!

Jane's definition revealed a number of important issues regarding the inclusion of exceptional students at Malcolm X Middle. First, Jane's model of inclusion seemed to be congruent with that of Karen; both believed that exceptional students needed to be placed in regular classes to the maximum extent possible. In addition, the definition also revealed her strong preference for co-teaching as a means to include exceptional students in regular classes. Apparently, her previous experience in a co-taught class had caused a lasting impression on Jane, as she had become one of Malcolm X's most vociferous proponents of co-teaching.

I enjoy it! I worked with another teacher for a year and loved it! We worked as a team. We did not isolate any one area. All subjects were taught. We went off on tangents at

times and had really deep discussions. We did hands-on activities and it went very well, I was very pleased. I was very upset when she went on maternity leave. Even though we both took responsibility for all the kids in class, when we did academics we grouped by ability. And it worked! The lessons were very successful because if you were working with a high group and a low group you could reach the students easier. You have a lot of resistance at first. Both of us were a little resistant. We didn't know each other very well. But eventually it blended. I think she learned a lot from me and I learned a lot from her.

It seemed that the initial reaction that teachers, exceptional as well as regular, had towards the notion of two teachers sharing responsibility for a group of students was one of caution, hesitance and fear of "losing control" of one's territory. However, Jane's response indicated that this initial hesitance was replaced with enthusiasm once the flexibility of having dual teachers in the room became apparent to these two teachers.

Commenting on the amount of preparation and planning that was necessary for a co-taught class to be effective, Jane explained:

Well, both of us worked summer school and we brainstormed a lot, so that by the time school started we had our first nine weeks curriculum down pat. We were very prepared. You work as a team and it wasn't just thrown on myself to have all the stuff ready. We went out and scoped and looked. Things she had, materials I had, we combined. We united everything. It went really well. It's a lot of work, but it pays off in the end!

The notion of having adequate preparation time to organize and implement a co-taught class seemed to be one of Jane's major concerns. Obviously, adequate time must be provided to teachers for the planning and running of such a non-traditional class.

Jane believed that co-teaching was an excellent strategy; one that allowed teachers to capitalize on their preferred teaching styles and students on their learning styles.

It's more work, but it's challenging work! You can do more activities, hands-on activities not just bookwork. You have two brains teaming together, brainstorming the things you like to do. Some teachers like hands-on and some like bookwork, so if you blend together and harmonize, you can come up with activities that just coexist among yourselves. That definitely helps students with their different learning styles.

All in all, it seemed that Jane found co-teaching to be an excellent means to not only meet the individual needs of all the students in her class, but one that enabled two teachers to employ their preferred style of teaching as well.

Jane's desire to see most exceptional students placed in regular classes might be explained in part by her view of exceptional students in general.

They're all individual. They're all unique. You can't say that exceptional students have any one characteristic. It's all interwoven. From my teaching experience all these characteristics are interwoven making up one whole student. Some exceptional students are very smart intellectually. They can prove themselves. They might even be smarter than regular students in the regular classes. It just goes to show you that they're they are more regular than special, they are just labeled that way. These labels are valid for funding, for political reasons, but if we are going to do inclusion, no they're not valid. I think as individuals we all have strengths and weaknesses. I have them also. Does that make me SLD? My weakness is math, but I excel in reading. What we really have to do is put them in regular classes where all the other children have strengths and weaknesses too. What we really have to do is group children by their ability level, not the label they carry.

It seemed that Jane preferred looking at her students in a positive light, that she looked at their strengths rather than their weaknesses. Rather than viewing them through the distorted lens provided by their official label, Jane simply looked at what made them a success. Rather than isolating these students in self-contained classrooms, Jane believed they should be placed in regular classes where other students had similar problems - with the support of an exceptional teacher. Jane had definite plans on how such a co-taught inclusion class should actually be structured. Arguing that an inclusion class would need additional human support, Jane explained

It might need a support facilitator to help out in the classroom. Somebody to give the ESE students the support they need to succeed in the classroom with regular students. So they can gain the organizational skills and conceptual knowledge they need to survive in the regular classroom. You could do that by having an ESE teacher combining a class of fifteen ESE students with a regular teacher and their class of fifteen students. They could work together and come up with great strategies for all the kids, even the regular students who don't have the skills and are falling behind in their classes. The support facilitator would be able to break down and modify lessons for the regular teacher.

It appeared that both Karen and Jane shared the same agenda for including exceptional students in regular classes--the actual merging of educational services at the classroom level. This is in sharp contrast to Gene and Linda who preferred having the support of an aide, rather than a certified teacher for the exceptional students in their classes.

Just like Karen, Jane didn't feel terribly affected by block scheduling.

It really doesn't affect me because I'm in a self-contained classroom and have my students all day long anyway. Do I like 90-minute blocks? If I was a regular teacher probably



not. To me it's just a way of deleting hallway traffic. I looked around yesterday as I walked my students to the bathroom and the hallway was dead! So I said to myself, this is what block scheduling is about. I think I would prefer to see all year round schooling instead. That might do something. They need more time in school period.

It seemed that exceptional and regular educators did agree on the dual benefits of block scheduling - increased student performance and decreased behavior problems. The ability of teachers to have less students, more flexibility in presenting lessons and a decrease of students moving about campus was an issue that had been raised numerous times by all participants during our continuing conversation. Jane's comment on block scheduling as a behavior management tool turned the conversation towards the issue of behavior at Malcolm X Middle School.

Behavior is definitely an issue that regular educators have to deal with. They are not used to working with ESE students and many of these regular teachers already claim many of their students have behavior problems. Actually they would like to have them tested so that they can be sent to an ESE class! These are supposedly "normal" students. This school seems to have a behavior problem in general. If we are going to send ESE students into these classes, they will really need some kind of support so that they will harmonize with the regular teacher. The whole population of this school warrants behavior support. Academics are not the major issue for inclusion at this school. Behavior is the main issue. Behavior can be a real stumbling block for inclusion. But if channeled in the right direction, if they had some type of support behind them it might work. What this school needs is a school-wide behavior system. Really, right now we are dealing with a different environment, a different breed of kids. Behavior is not just an issue the ESE department needs to deal with. The entire school needs to address the issue. You can see that by just walking down the hall. Sometimes the regular kids act worse than the ESE students. At least in ESE classes the kids get the proper support from paras that try to redirect any inappropriate behaviors. The regular teachers already

have 30-35 students in their classes and if they have any behavior problems they are hard to deal with. This fact makes them very hesitant to take on additional behavioral problems an ESE child might cause in their classroom.

Although Jane was an avid supporter of inclusion, just like Bob she believed the process would fail if the behavior issues that existed at Malcolm X Middle were not solved on a school-wide basis. Obviously, for these two exceptional teachers academic issues took a back seat to behavioral issues as far as inclusion was concerned at Malcolm X Middle School.

Jane definitely felt that the ability of teachers to include exceptional students in their classes had to come from within, that they must have ownership of the issue.

You just can't do inclusion. It has to come from within you and you have to have your whole heart in it! Actually, I don't think many people really believe in inclusion. It's two separate entities--ESE and regular. A lot of people don't want to be bothered by ESE. It's like the students aren't the only ones labeled; the teachers are also labeled. That's how I feel. We have like black marks on our foreheads! It needs a lot of work. We just need to broaden our perspectives.

Apparently, the regular and exceptional educators in the study agreed that the issue of communication or more precisely the lack of it, between exceptional and regular education hampered efforts toward inclusion at Malcolm X Middle. It seemed that conversation between regular and exceptional teachers would be necessary if substantial inclusion was to take place at Malcolm X Middle.

It appeared Jane, as well as Karen, was one of Malcolm X's most avid supporters of including as many exceptional students in regular classes as possible. She too had discarded the notion that exceptional students had to prove they deserved to be sent to regular classes. Jane replaced that outmoded model with one was truly student-centered.

Rather than insisting on exceptional students being placed in any one setting, Jane believed that placement should depend solely on the strengths and weakness of each particular child - including the regular classroom as much as possible. Along with Karen, she recognized the need for some self-contained classrooms, her own behavior class being a good example.

Behavior was as great a concern for Jane as it was for Bob. Jane perceived behavior as being a school-wide issue that had the potential to sabotage everyone's best efforts toward including exceptional students in regular classes. Believing that regular teachers would not want any additional behavior problems in their already hard to manage classes, Jane stressed the need for a more comprehensive behavior plan that would address the needs of all students at Malcolm X Middle.

Having had previous experience teaching in a co-taught class, Jane was a tremendous advocate for its' use in inclusionary classes. She had actually experienced the resistance and hesitation that the other participants only spoke of, as well as the benefits it provided to both teachers and students in that class. Jane saw co-teaching as the perfect means to provide support to exceptional students that might be placed in regular classes.

Finally, Jane too complained of feeling somewhat alienated from the regular staff at Malcolm X Middle. She spoke of a wide gulf that existed between regular and exceptional education and believed it to be responsible for the lack of interest some teachers had shown in including exceptional students in their classrooms at the school. Table 10 presents a summary of Jane's perspectives on inclusion.

Table 10

Jane's Perspectives on Inclusion

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- Avid supporter of inclusion.
- Believed that class placement depended on the strengths and weaknesses of individual students with the regular class being the preferred placement option.
- Extremely concerned that behavior had the potential to sabotage inclusion of exceptional students.
- Believed behavior was a school-wide issue that should not affect only the inclusion of exceptional students.
- Experienced with the use of co-teaching as an instructional strategy. Strongly supported its use in inclusive classrooms.
- Felt alienated from the regular education staff.
- Believed that the historic gulf between regular and exceptional education was responsible for the school's lack of interest in inclusion.

## Susan's Perspective

Susan, the ESE Department Chair, has been a teacher for twelve years, seven of which have been as a special educator at Malcolm X Middle. Susan brought a wealth of experience to Malcolm X Middle. The first five years of her life as an educator were spent as a regular education teacher at an elementary school in New York City. After moving to Florida, Susan obtained a teaching position as a VE teacher at Malcolm X and has been there ever since.

Susan's current teaching assignment, which has lasted for the last two years, found her co-teaching a self-contained EMH class. When asked to describe her feelings toward co-teaching, Susan exclaimed

I love it! I think it's a wonderful thing, especially in our situation. I'm a woman and he's a man and since our children come from such dysfunctional families, I feel in a way we've created our own little semi-family. You know, portraying the mom, dad and the kids. I really believe for the kids that they can identify with one of us better. So if personalities clash they can always go and ask for what they need from the other teacher. I think it's very positive. I think it also enables you to be more like a person. For example if you have to leave the room for a moment you're not leaving the kids alone. You can take over for each other. I think it works really well and I know the kids enjoy it. We both have fifteen kids assigned to each of us and we keep them separate in our roll books. But we're both responsible for behavior in the class and although we split up students for bookkeeping purposes, we collaborate on what grade each student should earn. We both plan together at the same time, so it's not a problem for us to get together to talk and plan.

Observations of Susan's class revealed that as far as teaching approaches were concerned, they both taught subjects within their comfort zone, Susan handling language

arts and reading while Don handled math and science. It appeared as if Susan and her co-teacher Don had resolved the issue of who was in charge by splitting administrative tasks down the middle, while at the same time handling behavioral and curriculum issues on a class-wide basis.

As far as block scheduling is concerned, Susan seemed to agree with other members in the ESE department.

Well, we're with the same kids all day so it doesn't really affect us. I'm doing what I usually have done because I've always been with them all day. I like that I have an hour and a half planning. Even if you have things to do, like meetings for example, I usually still have enough time to what I need done. I'm not sure if it's too long for the kids though. For my kids no because I break everything up into little sections anyway. For the rest of the classes? Well, we're a low functioning school overall and from what I hear, it's a little too long for these kids. I think the hallways are much calmer. I think there's not much rigmarole going on outside. You know, not so much movement. The kids aren't in the hall as much. I couldn't tell you if it's lessened fights for sure, but I haven't seen too many fights like I used to.

Obviously for Susan, block scheduling was as much a behavior management tool as it was a strategy for increasing academic achievement. In addition, her experience and comfort with managing activities that would last for the entire 90-minutes seemed to indicate that perhaps she and other teachers in the ESE department at Malcolm X Middle might be able to serve as mentors to the regular teachers that were struggling to adapt to this new classroom structure.

Like other members of her department, Susan favored more inclusion of ESE students in regular classes. Giving her opinion on the subject as department chair, Susan explained,

Inclusion is taking special ed. students and including them in the mainstream. You could have a regular class with ESE students in it. You could have what we have here, an OCR class and a behavior class. Instead of putting these low-functioning and behaviorally disordered kids in center schools, we have them included within our school. Basically, it's not just self-containing the kids. That way we're secluding them, not including them. I think we need a support facilitator. We have very large ESE classes here. We have lots of VE students that are higher functioning and could be included in a regular ed. setting. They could be in regular classes if we had someone out there supporting them. A lot of times we just throw the kids out there. In the past we had these forms called Mainstreaming with Assistance, which was literally only a form. You never met one-on-one with the child. The teachers simply filled out the paper and discussed it amongst themselves. I feel if the kids are higher functioning and are in regular classes they should have a teacher that's going to follow this group of children and help, perhaps co-teach, with the regular ed. teacher. They could help these kids be included with the regular kids. They could help them take tests and modify the curriculum to make it into simpler terms and assist them. They should have adaptations to the regular curriculum. But somebody needs to watch them. If you just throw them out there, they're not going to succeed.

Taking a slightly different twist on support facilitation, Susan envisioned such support being provided by an ESE teacher tracking a group of exceptional students in regular classes. Rather than actually co-teaching alongside the regular teacher on a full-time basis, the ESE teacher would act as a consultant providing accommodations and strategies on an as needed basis.

Susan was also aware of the wide gap in communication that existed between regular and exceptional educators.

Nobody helps them. Nobody watches over these students. Nobody asks the kids--How are you doing? A lot of the teachers are not aware of the fact they have ESE kids in their classes. They don't know the kids are in the room, so

they just get F's. Sometimes in passing a teacher will ask me--Do you know so and so? When I reply that he's an ESE student they tell me-- No wonder he's failing! They have no clue, so it's hard. From what I hear they get a list, but you know teachers get lots of lists. A list is just a list. Nobody talks to them. A support facilitator would definitely be beneficial if we want to go ahead with inclusion.

Susan's conception of support to exceptional students in regular classes seemed to be more in line with Gene and Linda's conception - ESE assistance being "pushed in" at the level of support personnel, rather than the actual merging of educational services at the classroom level.

During our conversations, Susan made a number of recommendations for the successful inclusion of exceptional students in regular classes at Malcolm X Middle. These concerns centered around three broad areas: instruction, support and training. On the topic of instruction, Susan advised,

Exceptional students need hands-on, manipulatives. They also need a lot of drill. A lot of practice. Whatever you're working on, they need to go over it, and you need to spiral it. In other words, if you start something this week, then next week you need to start by reviewing this material. They need constant reinforcement of any skill they have learned. I think cooperative groups work well with ESE students. I feel that they should be placed with some higher-functioning kids and some medium kids because they seem to work best when they are together and helping one another. What you shouldn't do is just put an assignment on the board and tell them to do it! You can't expect them to do many things independently. So, if you just put the agenda on the board, for example Math- pgs. 5-7, Reading-turn to page 85 and until 87, answer #'s 1-10, they won't get it! Those kinds of assignments are too much for them to organize and comprehend. They need more segments, like little mini-lessons. A negative thing would be to ask them to work on the same thing for the entire block. That would be too long for them. Especially since



now teachers have the 90-minutes to break their lessons up like that.

Susan had a number of concerns regarding the types of support regular teachers would need to successfully include exceptional students in their classrooms.

I think that regular teachers probably would need additional materials, like manipulatives and such. I mean, I have enough materials in my own class. I used to teach in New York City and we didn't get nearly as much as we get here! But for the regular teachers they will need more hands-on types of things. For example, if they were teaching money computation skills, the ESE kids would do better if they had fake bills to handle, rather than just pictures of them in a book. As I mentioned before, the regular teachers would also need additional human support in their classes. They really need some type of support facilitator. I don't think they would need any additional aides, just a regular and exceptional teacher. An aide would be nice in order to do copying and help gather materials, but not necessary. And I think they would need extra money, so they could reward the kids. I really think there should be some kind of reward system even in regular classes. Like for example, in our room we have a point system and once a month we reward those kids that did their work and behaved appropriately. We also need more training. We don't get enough from the school or the district. Take for example those IEP and Matrix trainings. I've been to three already and they change it every year. I feel they are constantly changing things and when you finally get to where you are supposed to be--they change it again!

Susan's recommendations for regular education teachers seemed to be in alignment with the concerns both Gene and Linda had regarding the exceptional students in their classrooms. As far as instructional practices were concerned, both regular teachers already employed many of the strategies Susan thought appropriate for exceptional students. Cooperative groups, peer tutoring, lots of practice and breaking the block into a number of related mini-lessons were all observed in these regular

classrooms. Gene and Linda had also expressed the need for more supplies and materials especially manipulatives, so that they could provide more hands-on activities for the students. In addition, both Gene and Linda desired more training so that they might better understand their students' labels and the impact they had on learning. However the issue of human support remained a dividing point between exceptional and regular educators. Gene and Linda were staunchly opposed to having a teacher in their room directing any learning activity although an aide, under their direction, would have been acceptable. On the other hand, Susan and all the other ESE teachers believed that if inclusion were to succeed at Malcolm X Middle, some type of direct support by a certified teacher would be necessary in the regular classrooms.

Susan, like many other participants in the study, had serious concerns about the behavior problem that existed at Malcolm X Middle.

Do I think behavior is an issue for including exceptional students in regular classes here? I think they need to be successful behaviorally in an ESE classroom prior to their going to a regular class. If they can't behave in a self-contained class, then I don't think they should be a candidate for regular classes. I think in this school behavior gets in the way of successful inclusion. We really don't have anyone in place now to assist students in the regular classes. I mean a regular teacher is probably not trained or have the tolerance and patience to deal with an acting-out ESE child! They might not know how to handle them and just say--Get out! --And that will that. I think that exceptional students should be given the chance to be included. But if they can't follow the school and class rules, then they don't belong in regular classes because it wouldn't be fair to the other students. If inclusion is going to be successful at this school then the behavior issue has to be addressed.

Susan, as did her colleague Bob, viewed behavior more as a classroom issue than a school-wide issue. She did not place her student's behavior in the context of the larger school community, where according to most other participants in the study, the behavior of exceptional students was not that much different than the behavior of the regular students. Rather, she viewed behavior as a stumbling block for students already placed in exceptional classes, something that needed to be "proven" before they could be placed in a regular class.

Although Susan believed that behavior was a potentially crippling issue for inclusion at Malcolm X Middle, she fully supported its implementation at the school because she really believed it was in the best interests of her students.

I think inclusion is a wonderful thing. Giving them a chance in a regular classroom will really boost their confidence and ego. In fact one of my seventh graders who is doing quite well in my class, came up to me and asked if he could be put in a regular class. He thinks the other ESE kids are too immature and he wants to see himself achieving higher standards. It's the end of the year and I think next year he should be put in a regular class. I feel this is a desire of his and I feel he is trying very diligently to succeed in my classroom. I see that he is mature enough and I think that rather than holding him back, I would like to see him fly. You know, soar. Basically, I think inclusion is a good thing!

Susan was pleased with the changes that CMS and block scheduling had brought to Malcolm X Middle. She believed that the new structure of the school made her life as a teacher more satisfying personally and that it allowed her to be more effective professionally.

I think now that we have that 90-minute block we have a lot more time to get in-service training. We get more time to speak with our administrators. We have more time to

speaking amongst ourselves, you know, to deal with the problems we are having. I see a lot more togetherness and discussions between the teachers. There's more time for it. To get together and discuss students and curriculum. On the eighth grade team that I am on we get to do a lot more things together. So, I think it really enables us to act in a professional manner.

Susan also believed that the culture at Malcolm X Middle did not really affect her ability to include exceptional students in regular classes. As a matter of fact, she felt the culture at Malcolm X was somewhat supportive of that idea.

I know that sometimes the rest of the staff here thinks that ESE teachers are a little different. But I don't think that hinders my beliefs in any way. Actually, most times regular teachers think I'm doing a great job! That I have the patience of a saint! They have actually positively reinforced my view of myself. And they don't exclude us. I think we're involved. I remember when I was little the special ed. classes were always on a separate floor, locked away. Here we're right in the middle of things. You know, it's not like we're separated!

So, while Susan believed that there was a serious communication gap between regular and exceptional education at Malcolm X Middle, a gap that perhaps had a chilling effect on inclusion at the school, she felt that other teachers' viewpoints regarding herself and her students were generally positive. Rather than feeling disconnected from the rest of the school, like Karen and Jane, Susan felt more included than excluded in the school community.

Susan's perspective on inclusion was similar to that of the rest of her ESE colleagues. She believed that many exceptional students should be placed in regular classrooms at Malcolm X Middle. Unlike Karen and Jane who believed that the regular class should be the first placement option for exceptional students, Susan thought the first

placement option should be a self-contained class. Like Bob, she felt exceptional students needed to prove they were ready to go into a regular education classroom. She also agreed with Bob on the issue of how behavior impacted inclusion at Malcolm X Middle. Both teachers agreed that behavior was a serious problem, one that would prevent them from sending their students into a regular classroom. The other participants acknowledged that behavior was an issue for them as well. However, they viewed the problem through a larger lens, insisting it was a school-wide issue; one that would not necessarily prevent exceptional students from being placed in regular classrooms.

Like Jane, Susan had actually experienced the ups and downs of co-teaching and despite the issue of territory and the extra work it entailed, she believed it was an excellent means to include exceptional students in regular classes. While maintaining that co-teaching would be an appropriate method of providing support to included students, Susan acknowledged that it did not necessarily have to be on a full-time basis as her other ESE colleagues believed. Rather, she envisioned such support being provided on a consultative basis.

While she acknowledged that there was a serious communication gap between regular and exceptional education at Malcolm X Middle, Susan felt more connected to the larger school community than did the rest of her ESE colleagues. Perhaps that was a function of her being department chair, a role that caused her to be in close contact with many other staff members. Whatever the reason, Susan's attitude regarding the culture at Malcolm X Middle allowed her to be the most positive and optimistic supporter of inclusion at the school.

Susan was also optimistic about the new structure that had been put in place at Malcolm X Middle. She enjoyed the bonding of staff and togetherness that CMS had brought to the school. She liked the fact that her days were much more manageable due to the increased time she had for planning and meetings. Susan also liked the increased professional development that CMS had provided her throughout the year. Table 11 presents a summary of Susan's perspectives on inclusion.

Table 11:

Susan's Perspective on Inclusion

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- Strong supporter of inclusion.
- Adhered to outmoded mainstreaming model of inclusion.
- Believed that the self-contained class was the preferred placement option for exceptional students.
- Believed students needed prove both academic and behavioral readiness for regular class placement.
- Felt that student behavior should prevent inclusion in regular classes.
- Had the most experience with co-teaching. Was an avid supporter of employing co-teaching as an instructional strategy in inclusive classes.
- Also supported the use of collaborative consultation as a means of supporting included exceptional students.
- Although she felt somewhat disconnected from her regular colleagues, she felt that the school was ready for inclusion.
- Believed that the school was structurally prepared for inclusion. Appreciated the increased collaboration and training opportunities brought about by CMS.

## Catherine's Perspective

Although she was not a classroom teacher, Catherine's perspective is included in the study since her job as ESE Specialist made her a key player in the inclusionary process at Malcolm X Middle. Of particular interest to the study were her views on the structure and culture of the school. Catherine believed:

Inclusion is ESE students being serviced with regular ed. students, either on a full-time basis or being in regular classes for most of the day. Inclusion is not just another name for mainstreaming. Full inclusion means having ESE students being served in regular classes full-time. Mainstreaming is when exceptional students are in ESE classes part of the day and regular classes for the rest of the day.

Catherine's definition of inclusion is the only one provided by participants that made the distinction between mainstreaming and inclusion. This was of critical importance because each term had different implications for exceptional students at Malcolm X. Most of the participants in the study spoke as if the terms were interchangeable, which they definitely were not. Inclusion implied exceptional students being put in regular classes as a first choice in placement options. Included students did not have to prove they were ready for regular classes. Rather the school had to prove why they shouldn't receive services in that regular setting. Mainstreaming, an older version of inclusion implied students were first placed in ESE classes and were put in regular classes only when they proved themselves capable of "handling" that more normal setting. Of all the participants in the study, only Catherine and Karen seemed to



have made this distinction. The rest of the participants thought the school was "doing inclusion" when in reality it had been following the older mainstreaming model.

Catherine's views on the structure and culture at Malcolm X Middle revealed a sense of optimism as well as a feeling that all was not well at the school. Catherine truly believed that the structure of Malcolm X Middle School supported inclusion of exceptional students.

I think CMS restructured the time of the teachers and staff to kind of organize the students. I'm not sure that everything was followed through properly. So in some ways it's good, but it still needs some work. As far as teachers all being off at the same time I think is great. With all grade level teachers being off at the same time, the ESE teachers and regular teachers have a time where they can meet and discuss the students, or they can help each other and give each other suggestions. In other more traditional schools the biggest problem for the inclusion model is finding time to meet. Also, if we use CMS the way we should then teachers can get more training so they will know how to handle the new 90-minute blocks. Do I believe the structure of the school supports inclusion? Yes. I think the structure right now is great to do that!

While Catherine personally believed the new structure at Malcolm X Middle would benefit the inclusion of exceptional students, she was unsure how other staff members viewed the situation.

Well you really do have the time to interact with other teachers. Actually the way the administration has set up the school day it's almost forced on you! But maybe that's what the school needs. I have some doubts because the system was not chosen by teachers themselves. I do think most teachers do like the way the school is structured. They do have more time to talk. I think they get upset because they have 30 minutes each day for meetings that are forced on them, that are scheduled by administration.

The structure of Malcolm X Middle was not the only source of concern for Catherine as she tried to coordinate the placement process for exceptional students at the school. Catherine found that the culture that existed at Malcolm X, often times impeded the process of inclusion.

I think the staffs' attitudes, what they believe, does affect things. For example, some teachers don't think they need to be a part of the whole picture. Like when I invite teachers to meetings they don't always feel like they have to attend. Some teachers don't feel like they have to go to any meetings at all! I don't know if that's the way they have always done it here or if that's just what they are choosing to do. I think this is where professionalism comes into the picture. You shouldn't have to remind people of their responsibilities! I think the structure of the school is set up well for inclusion, but maybe now we need to change that culture that exists. Maybe since we've changed other things, their way of thinking also needs to change.

It seemed that simply changing the structure at Malcolm X Middle was not enough to foster a change in teachers beliefs about themselves as professionals and what roles they played in the new organization of the school. However, Catherine's views on how the culture of Malcolm X Middle affected the inclusion of exceptional students were not totally negative.

Should we do more inclusion than we are doing now? Yes. You know it would be great if you could hand pick teachers that you could send ESE students to. I think in time, especially the younger teachers, are more open and will accept more ESE students and will work with them better. I think it's the older teachers that think ESE students should be in ESE classes. I have found that most of the teachers work pretty well with our students. A lot are overwhelmed, but with the right support they could handle it. The support could either be a co-teaching model, even if it's just for one particular block so they can model strategies and the regular teacher can try them in the other two blocks. Or an

ESE teacher meeting monthly or weekly with the regular teacher on a consultation basis.

Catherine's perspectives on inclusion seemed to be informed by a model that placed as many exceptional students as possible in regular class settings on a full-time basis, with additional exceptional students being placed in regular classes on a part-time basis. Catherine viewed the regular class as being the proper starting point for the placement of most exceptional students. Rather proving why these exceptional students needed to be placed in self-contained ESE classes, Catherine believed it was the school's responsibility to prove why they couldn't succeed in a regular class. While this distinction may seem to be only a matter of semantics, in reality the answer to both questions decided whether a student would be banished to a setting in which "proof of normalcy" was required to leave or whether they would be placed in a regular class and given additional support to help them succeed.

Catherine's view on how such additional support should be provided to regular teachers was similar to the support envisioned by Susan. Both believed that co-teaching was the ideal method of providing such support. However, unlike the rest of their ESE colleagues, Catherine and Susan did not believe that co-teaching need be done on full-time basis. Rather, they believed it could be done on regularly scheduled part-time basis or on an as-needed basis. In such a manner support could be given to exceptional students in regular classes without infringing on these regular teachers' "territory."

Finally, Catherine was optimistic about the new structure CMS had brought to Malcolm X Middle. She saw it as a means to increase collegiality through the time it provided teachers to meet and plan and also as a means to increase professional

competence through the time it made available for weekly in-service sessions. Catherine also viewed CMS as a possible catalyst for cultural change at Malcolm X Middle, although she had serious reservations about this role as the system was brought to the school by a top-down decision-making process rather than through bottom-up initiative. Table 12 presents a summary of Catherine's perspectives on inclusion.

Table 12

Catherine's Perspectives on Inclusion

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- Strong supporter of inclusion.
- Believed that the regular class was the preferred placement option for exceptional students.
- Did not believe that students needed to prove readiness for regular class placement. Rather, it was the school's responsibility to prove why regular class placement did not meet individual student's needs.
- Believed school must provide additional supports to help included students.
- Strong supporter of co-teaching as an instructional strategy for inclusive classrooms.
- Also supported the use of collaborative consultation as an alternative to the more radical notion of co-teaching.
- Viewed CMS as a catalyst for change, although had concerns with it being a District-driven rather than a school driven initiative.

## Summary of Participant Issues and Concerns

Life for teachers and students at Malcolm X Middle School had recently taken a turn into unfamiliar territory. Inclusion of exceptional students into regular classes was no longer an option to consider for Malcolm X Middle, it had become a mandated reality. The push to include *all* students in the general curriculum implicit in current state initiatives and national statutes required that schools such as Malcolm X Middle come up with local solutions to meet this challenging and elusive goal. This study examined the perspectives on inclusion held by seven teachers at Malcolm X Middle School in order to shed more light on the following guiding questions: 1) What elements constituted these teachers' perspectives on inclusion? 2) What variables had an impact on these perspectives? Models of the inclusive process envisioned by these teachers will be introduced in this section and will be developed more fully in Chapter Five.

### Emergent Categories

The key issues that emerged from the study may be considered in terms of three general categories: (a) teaching and learning, (b) school structure, and (c) school culture and climate. The conversation held among a group of regular and exceptional educators regarding the inclusion of ESE students in regular classes revealed points of conflict, as well areas of agreement and concern in all three categories.

## Teaching and Learning

Most educators, regular as well as exceptional were in agreement on the types of instructional strategies believed to be effective with exceptional students. As a matter of fact, both groups of teachers thought these same strategies would also work well with the low functioning, hard to teach regular education students that filled classrooms at Malcolm X Middle. The use of peer tutoring and cooperative learning groups were viewed as excellent means to increase student performance in the increasingly more heterogeneous classes found at Malcolm X Middle. The additional instructional time granted by block scheduling allowed both groups to provide more hands-on activities, as well as series of different, yet connected mini-lessons designed to reinforce the concepts being considered in their classrooms. Perhaps the most radical departure in instruction observed in the study was the use of community based instruction, a method that combined classroom teaching with reinforcement of learned skills in a real world setting. More traditional methods of instruction such as lecturing, individual skill sheets and independent seatwork were rejected by all participants as being ineffective means to meet the needs of exceptional, as well as many regular students in their classrooms. It seemed that changes in core instructional practices, long a feature of self-contained exceptional classrooms, were beginning to take seed in the inclusive regular classrooms observed at Malcolm X Middle.

Stark contrasts as well as points of agreement were found on the issue of what supports would be necessary if inclusion was to succeed at Malcolm X Middle. All participants in the study agreed that additional funding and materials would be necessary

if regular teachers were going to be able to provide the multi-sensory, hands-on learning activities thought to be advantageous to included exceptional students. Exceptional teachers were generally satisfied with the material support they had received in their classrooms, support that allowed them to individualize lessons to meet the differing educational needs of the students in their classrooms. However, the regular teachers lamented that they did not even have enough textbooks for their students, much less manipulatives and other hands-on materials.

Perhaps the most controversial issue revealed by the study was the type of human support to regular classes thought necessary to assist teachers with the increasing numbers of exceptional students that were entering their classrooms. All ESE teachers in the study believed support facilitation was the preferred method of providing aid to exceptional students in regular classes. The only difference of opinion between these exceptional teachers was exactly what form this support facilitation should take. One model suggested was that of full-time support facilitator in which regular and exceptional co-teachers assumed responsibility for a group of students in the same classroom. In such a model the regular teacher provided subject matter expertise and the exceptional teacher provided curriculum modifications and behavioral strategies to all students in the class. Implicit in this model was the actual merging of regular and exceptional education at the classroom level. A second model suggested was that of collaborative consultation in which both teachers, exceptional and regular, would meet on a regularly scheduled basis to discuss the included students issues and problems. In such a model a support facilitator might co-teach in a regular classroom only to model instructional strategies for the regular teacher. This support facilitator would not be in



the regular class on a full-time basis, rather only when scheduled. This model was not as radical a departure from the traditional organization of schools as was that of full-time support facilitation. Implicit in this second model is the notion that assistance to regular teachers would be provided above the classroom level along with other support personnel such as counselors and speech therapists.

Conversely, all regular educators were adamant in their refusal to accept another teacher in their classroom on a full-time basis. Both teachers had serious territorial concerns with the full-time support facilitation model advocated by their exceptional education colleagues. Each regular teacher spoke of possible conflicts in teaching styles as well as who would actually be in charge of such a co-taught classroom. The regular educators thought an aide, someone under their direct supervision, might be helpful in their inclusive classrooms. While more sympathetic to the notion of support being provided on a consultation basis, issues of power and territory caused them to reject co-teaching as an acceptable strategy in their classrooms.

### School Structure

Both groups of educators were positive in their evaluation of the benefits provided by block scheduling. All agreed that block scheduling gave them more time and flexibility to teach students. They appreciated having to see a smaller number of students each day, believing this reduction in numbers gave them increased opportunities to get to gain a deeper understanding of their students strengths and weaknesses. There was agreement on block scheduling being a behavior tool. The

participant's felt that the increased amount of time students spent in classrooms at Malcolm X had resulted in a calmer, more orderly campus.

Agreement was almost universal regarding the effect that CMS had upon Malcolm X Middle's quest to change the way it did business. Both groups of educators appreciated the increased amount of time they had to plan for lessons and to hold all meetings during the normal school day. All participants mentioned the increased collaboration among staff members that was evident at Malcolm X Middle, believing the sharing of ideas and discussion of common problems had allowed them to grow professionally as well as to be more effective in the classroom. Most participants indicated the increased opportunity for staff development was an extremely positive aspect of CMS. Both groups also felt that the structure put in place by CMS, as well as block scheduling, had created favorable conditions for increased inclusion to take place at Malcolm X Middle.

However, there was some evidence that the top-down implementation of CMS might prevent its' long-term success at Malcolm X Middle. Having been brought to the school by the district rather than through bottom-up initiative of the staff, CMS seemed to suffer from many of the implementation problems that plagued previous reform efforts-- resistance and misunderstanding. The imposition of dual organizational structures, one hierarchical and bureaucratic and the other collaborative and consensual, had created resistance among some staff members who had not yet been able to make sense of this new way of doing business at Malcolm X Middle. It seemed that additional experience with CMS might be necessary for its' successful adoption at Malcolm X Middle.

## School Climate and Culture

Although most regular and exceptional teachers believed that the structure imposed by block scheduling and CMS at Malcolm X Middle had made it ripe for inclusion to succeed, they disagreed on the effect that the school's culture had on the inclusionary process. The regular educators felt most teachers at Malcolm X were ready for increased inclusion to take place, at least in small increments. On the other hand, while exceptional educators felt the school staff was ready for increased inclusion, they also believed the school administration had a different agenda for the ESE department, that it was not really interested in inclusion at all. They spoke of feeling somewhat alienated from their regular education colleagues, that just as their students had been labeled ESE, so too were the ESE teachers. They believed this negative connotation hampered their efforts to work more closely with their regular education counterparts.

Related to the notion of staff readiness for inclusion of exceptional students, was the wide gap in communication that existed between regular and exceptional education at Malcolm X Middle. Historically, exceptional students had been served in self-contained classes at the school. There had been little movement of students between these exceptional and regular classes and what inclusion had been attempted, was of the old mainstreaming model. Most staff members assumed that if a student had been identified as having some type of disability that educational services should be provided in a self-contained class with a teacher that had "special skills" appropriate only for these exceptional students. It was further assumed that these identified students had to "prove" their readiness to return to the regular classroom, a return that could be characterized as

"sink or swim" as far as support to these students was concerned. This virtual separation of regular and exceptional education came to be accepted, as "just the way" Malcolm X should be organized. As a consequence, when the push towards inclusion intensified and regular class placement became the preferred placement option for exceptional students at Malcolm X Middle, regular and exceptional teachers were expected to work collaboratively in an organization that had yet to truly establish such a collegial atmosphere.

Finally, behavior was an area of concern for all teachers in the study. All participants felt that inappropriate student behavior at Malcolm X Middle had created an environment that prevented them from being as effective in their classrooms as they would liked to have been. However, not all participants agreed on the effect this behavior had on the inclusion of exceptional students. Some thought that behavior was a school-wide issue and therefore was not a concern that needed to be addressed specifically for exceptional students. Such a point of view had little affect on the inclusion of exceptional students at Malcolm X Middle. Conversely, other participants believed that the inappropriate behavior of exceptional students' was indeed a barrier to their being included in regular classes. These teachers believed that behavior was one of the things an exceptional student needed to "prove" before they would be allowed to go to a regular class at Malcolm X Middle.

## Models of Inclusion

After examining these seven teacher's perspectives on inclusion, two distinct models of inclusion of exceptional students into regular classrooms emerged. Each model is based on differing assumptions regarding professional competence and responsibility, student readiness and the adequacy of classrooms to accommodate the individual needs of exceptional students. Each Model also focuses on different interpretations of the least restrictive environment thought necessary for exceptional students' school success - content or location of services.

### Model One: Content Focused Inclusion

This model assumes that the content of an exceptional student's education is far more important than where those educational services are actually provided. Furthermore, in light of recent reform attempts such as the Sunshine State Standards and strong language provided in the 1997 Amendments, the regular education class with its more challenging and rigorous curriculum is regarded as being the most appropriate starting point for the student to receive this education.

This model further assumes a shared responsibility for the education of exceptional students on the part of regular and exceptional education. This may be accomplished by providing included exceptional students and their regular teachers with the assistance of additional human support in the classroom, on either a full or part-time basis.

The model also assumes that adequate monies and materials will be provided to these inclusive classrooms so that teacher's might maximally employ alternative instructional practices to benefit all the students in the class, regular as well as exceptional. (see Figure 2).

### Model 2: Location Focused Inclusion

This model assumes that the location where an exceptional student receives educational services is of the utmost importance. The self-contained exceptional classroom is preferred over the regular classroom as a starting point due to the unique ability of the exceptional teacher to meet the individual needs of all the students in the class. Furthermore, the less challenging, modified curriculum found in these classes is thought more appropriate for exceptional students.

This model does not assume shared responsibility for the education of exceptional students on the part of regular and exceptional education. Rather, both are seen as separate entities, unique unto themselves. In such a situation, exceptional students and their regular teachers are provided with a minimum of support services from the exceptional education department.

Like Model One, this model assumes that adequate monies and materials will be provided to these inclusive classrooms so that teachers might maximally employ alternative instructional practices to benefit all the students in the class, regular as well as exceptional (see Figure 3).

Figure 4 presents a brief summary of participant demographics including: year's of teaching experience, highest level of education, type of in-class support thought necessary to include exceptional students in regular classes and the model of inclusion that each participant followed.

Figure 2

Model One: Content Focused Inclusion

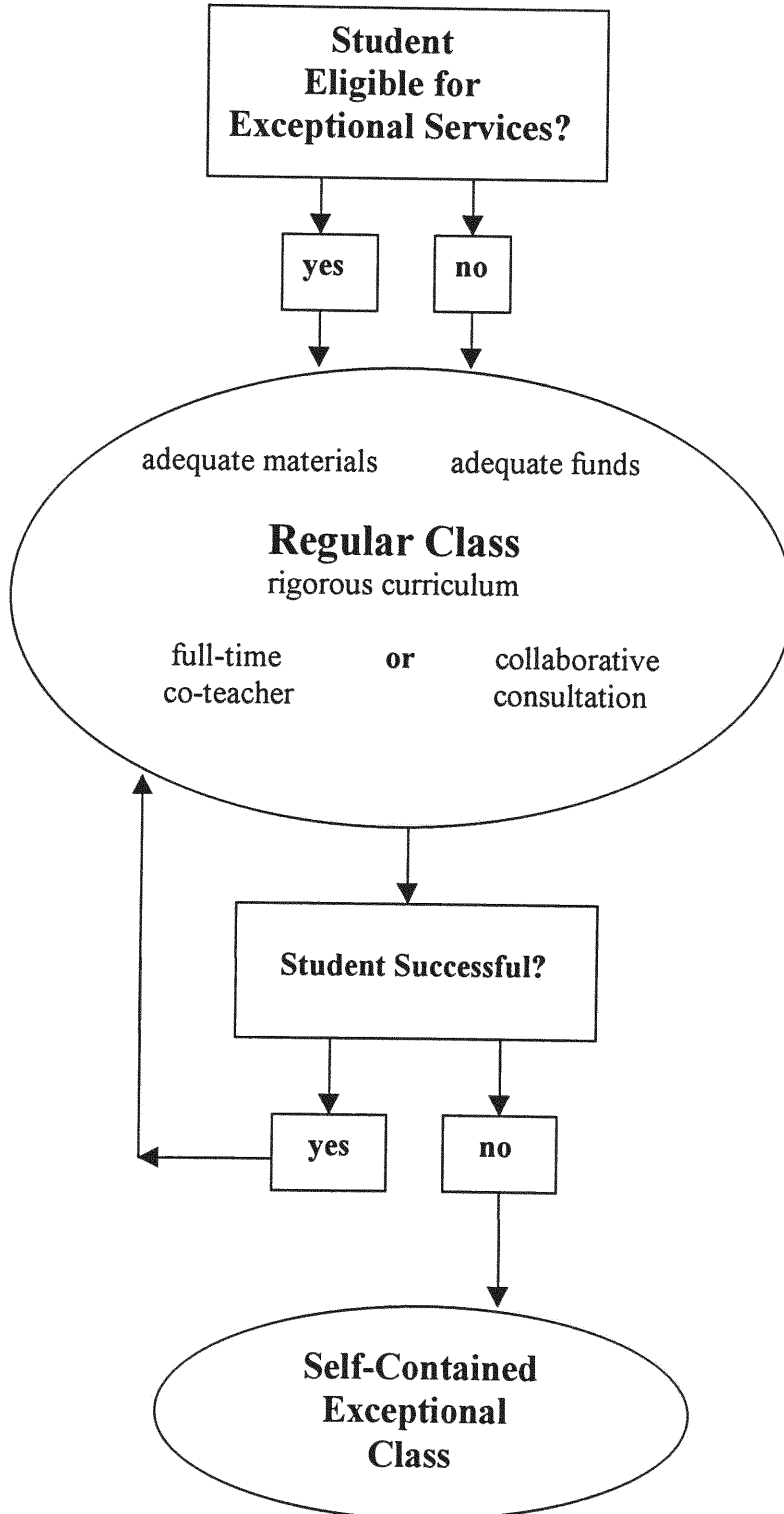




Figure 3

Model Two: Location Focused Inclusion

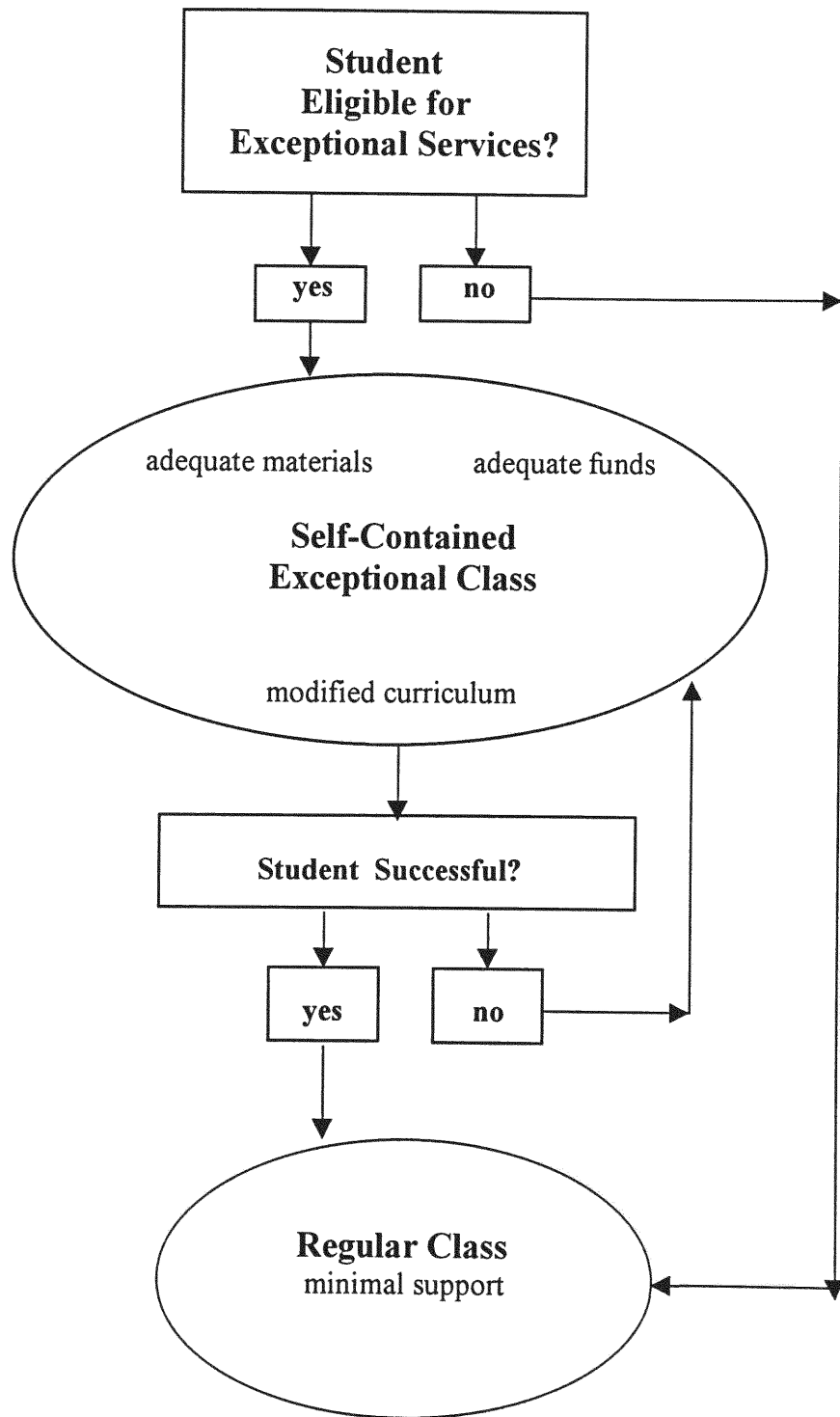


Figure 4

Participant Demographics

Participant	Years of Experience	Level of Education	In-Class Support	Model of Inclusion
Gene	5	Masters	Full-time Aide Only	Location Focused Inclusion
Linda	3	Masters	Full-Time Aide Only	Location Focused Inclusion
Karen	3	Masters	Full-Time Co-Teacher	Content Focused Inclusion
Bob	1	Bachelors	Full-Time Co-Teacher	Location Focused Inclusion
Jane	5	Bachelors	Full-Time Co-Teacher	Content Focused Inclusion
Susan	12	Masters	Full-Time Co-Teacher / Part-Time Collaboration	Location Focused Inclusion
Catherine	8	Masters	Full-Time Co-Teacher / Part-Time Collaboration	Content Focused Inclusion

## CHAPTER V

### SUMMARY, CONCLUSIONS and RECOMMENDATIONS

Those of us committed to education are committed not only to effecting continuities but to preparing the ground for what is to come.

Maxine Greene, 1988

This final chapter is divided into three sections. The first section presents my construction of the key issues that emerged during the study. Here the exploratory questions that guided the study are considered. The second section contains the conclusions of this research. Here the issues that emerged in the study are related to those that were discussed in Chapter II, the review of related literature. The final section presents a personal reflection on the study and recommendations for further research.

#### Inquirer's Construction of Key Issues

The purpose of this study was to describe and explain the perspectives on inclusion held by a group of seven middle school teachers as they attempted to include exceptional students in regular classes over the course of one semester. Given this purpose, the exploratory questions that guided the study were: 1) What elements constituted these teachers' perspectives on inclusion? and 2) What variables had an impact on these perspectives? The key issues that emerged in the study presented in Chapter IV are considered in terms of three general categories: (a) Teaching and Learning, (b) School Structure, and (c) School Climate and Culture. The discussion

within the first category addresses the nature and effects of teachers' interpretations of practices that influence inclusion, as well as the nature and effects of teachers' interpretations of themselves as professionals. The discussion of the remaining two categories addresses the effect the organizational culture of schooling has on these interpretations, as well as the ways in which the organizational culture of schooling and teachers' interpretations self and practice impacts on their ability to implement the successful inclusion of all students in regular classrooms.

### Teaching and Learning

The instructional strategies used in regular as well as exceptional classes at Malcolm X Middle were remarkably similar. In particular two strategies, cooperative learning and peer tutoring, were used either on a formal or supplementary basis in all the participants classrooms. Both strategies have been described in the literature as appropriate for use in inclusive classrooms. In general, these strategies represent a means for enhancing the ability of general education teachers to meet the needs of diverse groups of students, including those with disabilities (Deno, Foegen, Robinson & Espin, 1996). Cooperative learning has been shown to be effective in the acquisition of lower-level tasks such as those involving motor skills, decoding, and recall of factual information (Johnson, Maruyama, Johnson, Nelson & Skon, 1981; Slavin, 1983) as well as in the formation of superior problem-solving abilities (Qin, Johnson & Johnson, 1995). Cooperative learning has also been shown to produce positive achievement outcomes

(Slavin, 1984, 1987; Stevens & Slavin, 1995) as well as increased positive relationships among students (Johnson, Johnson & Holubec, 1994).

All of the exceptional teachers in the study used cooperative grouping as a major instructional strategy in their classrooms. They appreciated its' power to meet the individual needs of all the students in their classes. By pairing low functioning students with peers who were achieving at a higher level, they were able to provide additional learning experiences in a different, highly structured yet less threatening manner. Perhaps it was a function of their familiarity of looking at each student's strengths and weaknesses as a basis for making instructional decisions that allowed these exceptional educators to feel comfortable with implementing cooperative grouping in their classes. However, other factors came into play in these self-contained classrooms that facilitated its use as an instructional strategy. Smaller class size and adequate human support in terms of the availability of paraprofessionals to help with the movement that accompanies cooperatively grouped classrooms allowed exceptional educators to use this strategy to an even greater degree than their regular education colleagues.

Both Gene and Linda used cooperative groups in their classrooms only as a supplement to their preferred mode of instruction, which consisted of the more traditional lecture and seatwork type of delivery. This was not surprising considering the fact that both taught subjects crucial to Malcolm X's staying off the state's critically low performing school list -mathematics, reading and writing. Despite the fact that both teachers cautioned against using "strictly bookwork" as an instructional method, Gene and Linda were obliged to use texts that were aligned to state assessments on a daily basis. In addition, both followed department-wide teaching schedules designed to cover

important concepts contained on those assessments. It seemed as if the drive to improve test scores did indeed have a direct impact on how teachers taught and students learned at Malcolm X Middle School.

Nevertheless, both Gene and Linda were comfortable with implementing cooperative groups in their classes as extensions of lessons already taught. Gene utilized these groups as a means to develop a deeper understanding of the mathematical concepts he covered during his main, more traditional lesson. The increased time brought about by block scheduling allowed Gene more flexibility to present lessons in a different format, thus increasing the chances for his included exceptional students to be successful with the increasingly more rigorous curriculum found in his regular classroom. Linda used cooperative groups to an even greater degree in her classroom. Being a "projects" type of teacher, Linda used cooperative groups to involve her students in hands-on enrichment activities that allowed them to use all their senses to demonstrate mastery of concepts taught in her classroom. The use of cooperative groups in both teachers classes allowed them to reinforce instruction for their exceptional students to a degree that would not have possible in a strictly "bookwork" type of classroom.

Peer tutoring was another instructional strategy employed in regular as well as exceptional classrooms at Malcolm X Middle. As regular classrooms at Malcolm X became increasingly more inclusive in nature, teachers searched for interventions that would be effective with students who presented a wide variety of skills and abilities. Peer tutoring has been described in the literature as just such an effective measure (Cohen, Kulik & Kulik, 1982). According to King-Sears and Cummings (1996) peer tutoring works well in general education classrooms as an inclusive practice because it

provides opportunities for each student to: (a) work on his or her instructional level, (b) function as tutor and tutee, and (c) interact with other students of varying skill and ability levels. (p.220). These attributes were of extreme importance in classes such as Gene and Linda's where class size and lack of a full-time aide prevented them from giving exceptional students the individual attention they may have gotten in a self-contained classroom. Peer tutoring has also been viewed as being an effective teaching measure because it provides repeated practice on materials that have already been presented in the classroom. (Rosenshine & Stevens, 1986). Repetition and drill of skills previously taught had been recommended by many of the exceptional educators in the study and was an integral part of their classrooms. In addition to academic benefits, peer tutoring also was employed in classrooms at Malcolm X as a means to improve the social skills of students, providing a structured context in which students could practice such skills. That these skills needed to be taught on a formal basis at Malcolm X Middle was not surprising considering the fact that all participants in the study named behavior as a problem that impacted upon the successful inclusion of exceptional students at the school.

Perhaps the most important consideration that emerged from observing and discussing instruction at Malcolm X Middle was that exceptional and regular classes were more alike on that account than most of the participants in the study actually believed. Despite the fact that Gene believed ESE classes might be more beneficial to students than his regular class, or that Karen and Jane both felt the regular teachers at Malcolm X thought they had some type of "special skills", it appeared that to some extent both regular and exceptional educators were actually using some of the same instructional techniques in their classrooms. As the discussion regarding including more exceptional

students in regular classes at Malcolm X Middle continues, the myth of exceptional teachers being uniquely suited to teach ESE students becomes less tenable in light of this similarity in instructional techniques used. This correspondence in techniques also lent credence to the notion that the artificial separation between regular and exceptional education at Malcolm X Middle had outlived its usefulness as a "sorter" of students. In a school where most students were perceived as being in need of maximum educational services, the wholesale separation of exceptional students from their equally low-performing regular peers seemed to be unwarranted. Based on low standardized test scores and discussions with teachers such as Gene and Karen who reported that even regular students had difficulties with their texts and assignments, the exclusion of exceptional students from regular classes had become increasingly hard to justify in terms of intellectual "deficits" these students supposedly presented. In addition, separating the expertise exceptional teachers had in the areas of behavior management and curriculum modification from their regular education colleagues seemed to be unwise as well as a wasteful duplication of educational services in such a needy school as Malcolm X Middle.

Related to the issue of instructional strategies used in inclusive classrooms at Malcolm X Middle, was the concern of regular education teachers that they did not have sufficient materials to meet the needs of their included students. Lack of such material support has been identified in the literature as being an important barrier to inclusion (Fullan & Miles, 1992; Werts, Wolery, Snyder, Caldwell & Salisbury, 1996). Both Gene and Linda complained of not having a sufficient supply of hands-on materials that they could use to develop alternative instructional activities for the included as well as regular



students in their classes. Linda was a firm believer in the power of projects as a means to tap into the multiple strengths possessed by all her students. The elaborate display of multi-media student works in her classroom was a testament to this belief. Gene too depended on providing manipulatives to all students in his class as a means to reinforce the abstract mathematical concepts he developed in his more traditional class-wide presentations. For both these regular educators, lack of material support was viewed as a barrier to the successful inclusion of exceptional students at Malcolm X Middle.

The most contentious issue that emerged during the study was the type of human support thought necessary for inclusive classrooms to succeed at Malcolm X Middle. Unhappy with the "sink or swim" model of inclusion being used at Malcolm X, all the exceptional educators in the study believed that some form of support facilitation was necessary for included students to be successful in their more demanding regular classes. Susan and Catherine suggested the collaborative consultation model of support, shown to be effective at the secondary level by the Florida Department of Education (1989; 1990) would be the most potent means of aiding their regular education colleagues. This model assumed the relationship between the exceptional educator, the presumed expert in behavioral strategies and curricular modifications, and the regular educator, the presumed subject area expert, would be equitable as well as mutually reinforcing. Such an arrangement would not deviate to any great degree from the traditional manner in which schools provide educational services to students. Just as any other support person such as a family counselor or speech therapist might provide additional services above the classroom level, so would a support facilitator following this model. In such a scenario, the support facilitator would provide suggestions and modifications to the regular

education teacher who would ultimately be responsible for their implementation in the classroom. Although it was presumed that both the regular and exceptional teachers were equals in this collaborative relationship, it was not presumed that they shared equal responsibility for actually providing services to included students. Implementation of any curricular modification or use of any suggested strategies remained in the hands of the regular educator in this model.

Karen, Jane and Bob proposed an even more radical form of support for regular education teachers and their included students - co-teaching. These three exceptional educators believed that the extensive curricular and behavioral demands put on regular educators by the included students at Malcolm X Middle required more than simple collaboration on a regularly scheduled basis. Co-teaching is not a new model of delivering instruction. According to Mc Gregor and Vogelsberg (1998) it was popular during the era of open schools and initial indicators of its value as a special education support model are quite promising. The literature describes co-teaching as an effective means in creating a motivating learning environment, as well in providing opportunities for teachers to meet the needs of all students in their class (Pugach & Wesson, 1995). Co-teaching has also been shown to positively impact on the social skills of low-achieving students and enhance the sense of community in classrooms due to increased teacher time and attention (Walter-Thomas, 1997). The co-teaching model envisioned by Karen, Jane and Bob required the involvement of regular and exceptional educators in both the planning *and* implementation of educational services for included exceptional students. Each believed that educational services should actually be merged at the classroom level. In such a co-taught class a regular and exceptional educator would share

equal responsibility for all students in the class. No distinction would be made between exceptional or regular students, as each teacher would be expected to provide appropriate educational services to *any* student as the need arose. Such an arrangement would virtually guarantee that assistance could be provided to included students on an immediate, full-time basis rather than having them wait for a support person to visit their class. It would also allow exceptional teachers to share their expertise with low-performing regular students in the classroom, a need that had been identified by regular as well as exceptional educators in the study.

However, such an instructional arrangement would be a radical departure from accepted practices at Malcolm X Middle. Although three teacher teams were used to plan for the educational needs of regular education students at the school, the actual implementation of these plans remained in the hands of individual teachers. Delivering instruction in such a collaborative mode would require a fundamental realignment of teacher roles and responsibilities at Malcolm X Middle. Co-teaching as a means to further the inclusion of exceptional students would require a shift of paradigm on the part of exceptional as well as regular educators. The focus of classroom instruction would have to redirect itself from one in which isolated teachers directed and took responsibility for all classroom activities, to one in which teams of teachers worked together and collectively assumed responsibility for all students in their classrooms. Such a situation did not seem to be at hand at Malcolm X Middle when the beliefs of regular educators were taken into account.

In contrast to these two collaboratively based models of instruction, Gene and Linda were adamant in their opposition to accepting another teacher in their classrooms

on a full-time basis. Both regular teachers acknowledged that the assistance of an aide might be helpful in their increasingly more heterogeneous classrooms. However, issues of power, control and teaching styles prevented their acceptance of the types of support envisioned by their exceptional colleagues. Each was unsure of who would "be responsible" and who would "be in charge" of such a co-taught class. In addition, Linda was concerned about the possible negative effects that different teaching styles might have on such a collaborative relationship.

That both regular educators should have such a negative reaction to additional human support in their classrooms is not surprising when their views of themselves as professionals are taken into account. Gene as well as Linda felt supremely confident in their abilities to teach all types of students. Both felt they had sufficient university training to deliver and modify curriculum for their diverse classrooms. They also believed that they possessed adequate behavior management strategies to deal with the inappropriate social skills of students at Malcolm X Middle. The desire to receive additional training in exceptional labels and how these labels affect student achievement would only serve to reinforce their mastery over their classrooms. Given these personal views on professional competence and taking into account the historic separation of regular and exceptional educators at Malcolm X Middle, Gene and Linda's preference for remaining isolated in their classrooms was hardly unanticipated.

## School Structure

Two key structural components of Malcolm X Middle School emerged as critical factors in the inclusion of exceptional students in regular classrooms, block scheduling and the Comprehensive Management System. Block scheduling was viewed by all participants as being an effective means to include exceptional students in regular classes. The additional time it granted teachers allowed them greater flexibility to present and review lessons in a number of traditional and non-traditional formats. Literature on block scheduling seems to agree with this point of view. According to Cawaleti (1994) block scheduling enables teachers to use a variety of instructional approaches, decreases the number of students taught per day, helps teachers to develop closer relationships with their students and provides additional opportunities for teachers to help students. In addition, block scheduling has been viewed as a means to bring more coherence to teachers and students' everyday lives in school. Critics have long characterized the traditional seven to eight period schedule as a design that promotes incoherence (Zemelman, Daniels & Hyde, 1993). In Gene and Linda's classes the additional 30 minutes in each block allowed them to provide included exceptional students with opportunities to "relearn" the materials that had been presented in their more traditional lectures. The reduced number of students that both teachers had to deal with due to block scheduling also allowed them to gain a greater sense of their students strengths and weaknesses.

For all the exceptional educators in the study, block scheduling was really a "non-issue". Long used to being self-contained for the entire day, Jane, Karen, Bob and Susan

had already been using instructional practices, such as cooperative learning, mini-lessons, hands-on manipulatives and peer tutoring that were now becoming commonplace in regular education classrooms. It seemed as if the time benefits of block scheduling had allowed regular educators at Malcolm X Middle to bring instruction in their classrooms into closer alignment with the effective instructional practices that had long been a part of self-contained exceptional education classes.

Perhaps the most important structural element emerging from this study was the Comprehensive Management System. It seemed as if CMS had profoundly affected the manner in which Malcolm X Middle had organized itself to better serve its' students. With the exception of Gene, all participants in the study appreciated the time it allowed for various meetings to be held during the normal school day. This new found ability to schedule meetings at some point during the school day encouraged greater collaboration among the three teacher teams that were employed at Malcolm X Middle. Both Gene and Linda used such meetings to meet with their third team member to discuss curricular and behavioral problems that they had been experiencing in their classrooms. All participants agreed that the extra 30 minutes of individual planning that they had received due to the implementation of CMS had allowed them to be better prepared for lessons in their classes. Again, only Gene complained that on occasion some mandatory, grade level or school-wide meeting interrupted this individual planning. All participants except one agreed that the in-service component of CMS was extremely effective for the introduction of new teaching strategies and improvement of technological skills. The lone dissenter Jane, thought that too much emphasis had been placed on this component, believing the old method of leaving campus for training had been just as effective.

The most far-reaching aspect of CMS that emerged during the study was its impact on collegiality and collaboration at Malcolm X Middle. Previous to its implementation entire grade level teams as well as individual teachers planned at various times during the school day, a situation that was ideally suited to perpetuating the isolation of teachers in their classrooms. After a year's experience with the schedule brought about by CMS, all participants in the study agreed that it had indeed brought the staff at Malcolm X Middle much closer together. They reported that the ability of entire grade level teams to plan and discuss common problems had made them more effective in their classrooms. In addition some participants, for example Linda and Susan, believed that the increased collegiality and collaboration brought about by CMS was responsible for increased personal bonding among faculty members. All the participants in the study, especially Catherine, agreed that the structure put in place by CMS, as well as block scheduling, had created favorable conditions for increased inclusion of exceptional students at Malcolm X Middle.

A note of caution must be made regarding the implementation of CMS at Malcolm X Middle. Despite the fact that all participants in the study seemed to agree on its positive influence on the school: the increased collaboration and collegiality among staff members, the opportunity for increased training and the "bonding" of the faculty in general, Catherine reported some staff members still did not attend required meetings concerning their exceptional students. She lamented that in addition to changing the structure at Malcolm X Middle that perhaps the culture needed adjustment as well. It was obvious to Catherine that two schools seemed to exist at Malcolm X Middle, one that was team-oriented and collaborative in nature and the other set in "doing things the way we

always have". So while the organization that CMS brought to Malcolm X Middle made sense to some teachers, it seemed that other teachers had not yet accepted it's new way of doing business.

Despite the discussion regarding the positive impact that CMS had made upon teachers abilities to meet together and plan instructional strategies to better meet the needs of students in their classes, the division between exceptional and regular education seemed to be as wide as ever. There was little evidence to show that increased common planning time had brought about increased collaboration between regular and exceptional teachers at Malcolm X Middle. As a matter of fact, Jane complained that during many of the grade level meetings she had attended during the year, the issues discussed had little bearing either on her practice or on the problems her students faced. Karen who believed that inclusion of exceptional students at Malcolm X Middle was simply not on the school's agenda echoed this sentiment. It seemed that without some type of overarching, school-wide philosophy to guide its implementation that inclusion may indeed not have been on the Malcolm X's agenda.

### School Climate and Culture

While most regular and exceptional teachers believed that the structure of Malcolm X Middle School had prepared it to include more exceptional students in its classrooms, contrasts between these two groups of teachers emerged during the study regarding the effect that the school's culture had on this inclusionary process. Both Gene and Linda believed that in general, certain of the regular teachers at Malcolm X Middle



were ready for increased inclusion to take place. As a matter of fact, they believed that teachers at the school were better prepared for inclusion than were the students. Linda in particular felt that regular teachers at Malcolm X Middle had the academic and behavioral skills necessary to include exceptional students in their classes. However, Linda cautioned that if inclusion was to be successful At Malcolm X Middle that it should proceed at a slow pace. She was concerned that large numbers of exceptional students being included all at once might overwhelm regular teachers and sour them on the process.

In contrast to Gene and Linda who felt that in general, regular teachers viewed themselves as being competent enough to include exceptional students in their classrooms, most exceptional educators in the study were unsure if this readiness actually existed. Catherine and Susan thought both the structure of the school and the readiness of regular teachers to have exceptional students in their classrooms would allow inclusion to succeed at Malcolm X Middle. In particular, Catherine thought only a few of the "old-timers" presented any problems for included students. Karen, Bob and Jane thought the structure of the school made it ripe for inclusion to take place, however they were undecided whether the regular teachers were truly prepared to deal with issues that exceptional students would bring into these regular classrooms. While they believed the regular teachers were professionally capable of teaching these included students, they were not sure that the regular teachers really believed in the notion of inclusion itself. All three exceptional educators felt somewhat alienated from their regular education peers. They believed that just as their students carried an exceptional label, so did they as exceptional teachers. So although regular teachers might be competent enough and the

school properly structured for inclusion to take place, Karen, Bob and Jane believed the lack of regular education buy-in to the concept of inclusion restricted its implementation at Malcolm X Middle.

Finally, behavior emerged as an issue that concerned all participants in the study. All agreed that inappropriate student behavior at Malcolm X Middle definitely had an impact not only on instruction in classrooms, but on the poor academic achievement of students as well. The large number of security guards and closed circuit cameras on campus certainly attested to the fact that Malcolm X Middle had been experiencing some type of behavior problem. However, there was disagreement on exactly if, or how this behavior problem impacted on the inclusion of exceptional students at the school. Karen and Jane agreed with Gene and Linda that the behavior of students was a school-wide issue, not necessarily an exceptional education issue and therefore should not have been a deciding factor in placing exceptional students in regular classes. Conversely, Susan and Bob believed that inappropriate behavior of exceptional students in self-contained classrooms was an issue that needed to be addressed specifically for these students. Both teachers believed that exceptional students needed to "prove" that they were ready behaviorally to leave the self-contained classroom.

### Models of Inclusion

Based upon these teachers's perspectives, two distinct models of inclusion emerged during the study. Each of the model's guiding principles were grounded in differing assumptions regarding professional competence and responsibility, student

readiness and the material adequacy of classrooms to meet the unique needs of included exceptional students. In addition, each was characterized by different interpretations of what educational placement constituted the least restrictive environment and what accommodations were thought necessary for exceptional students' school success in that placement. These differing interpretations focused on either: 1) The *location* where educational services were provided, or 2) The *content* of the educational services that were provided.

### Location Focused Inclusion

The first model, Location Focused Inclusion (LFI), was the type that had typically driven placement decisions for exceptional students at Malcolm X Middle. This model of inclusion made sense to Susan and Bob, as well as Gene and Linda who all believed that exceptional students had to "work their out" of self-contained exceptional classrooms. LFI assumed that the location where exceptional students received educational services was the most important factor that needed be taken into account when making placement decisions for students. It further assumed that a self-contained exceptional education class taught by an exceptional educator delivering a modified curriculum was the preferred placement option for identified students. This modified curriculum often employed totally different texts than those used in regular classes and was not geared to the actual grade level of the student. Rather, attempts were made to match curriculum to the student's actual achievement level. Such a modified curriculum prevented students

from participating in many state assessments and often led to their earning special diplomas upon graduating from high school.

LFI presumed that an exceptional student had to "prove" academic and behavioral readiness in order for them to be included in a regular education class. Often such placement decisions were made without consultation with the regular teacher whose class the student would be "allowed" to attend. Once included, support from exceptional educators was minimal and students were forced to "swim or sink" in their new class.

LFI further assumed individual teacher responsibility for student success in their classrooms. In this model individual teachers were responsible for the planning and implementation of instruction for all students in the class. Although additional assistance in the form of "outside" support might be given to these classes, individual teachers were ultimately responsible for implementing the curriculum.

Finally, LFI assumed that adequate funds and materials would be provided to inclusive classrooms. In such a manner regular teachers would have enough supplies and materials to provide all the students in their classes, especially the included ones, with learning experiences that best suited their needs.

### Content Focused Inclusion

The second model, Content Focused Inclusion (CFI) assumed that the content and quality of an exceptional student's education was the most important factor that needed to be addressed when making placement decisions. Karen, Jane and Catherine were proponents of this type of inclusion. Each believed that most students at Malcolm X

Middle, regular as well as exceptional, were already performing at such low levels that it made little sense to have separate exceptional classes. CFI presumed that the regular class was the preferred placement option for students. Rather than proving why educational services *could not* be provided to exceptional students in a regular classroom, this model assumed schools needed to identify accommodations so that students *could* be successful in regular classes. Student access to the regular curriculum with its' high standards was a key component of this model. In such a way all students, exceptional included, would be provided with a rigorous educational experience.

CFI further assumed that the education of included students would be the responsibility of teams of teachers, rather than being the sole responsibility of the regular educator. Additional human support would be provided to the classroom teacher so that the modifications and accommodations thought necessary for the included student's success in the regular class might actually be implemented. This additional support would be provided on either a part-time basis in the form of collaborative consultation, or on a full-time basis in the form of co-teaching. In either case, joint responsibility between regular and exceptional educators for the planning and implementation of instruction was a hallmark of this model. Implicit in this model was the notion that teaching was not a solitary act, that not all activities in the classroom needed to be under the control of one teacher. Each member of the team would be expected to provide students with a different area of expertise, regular educators providing subject matter knowledge and exceptional educators the modifications and accommodations needed to meet the needs of *all* students. Narrowing the gap that existed between regular and exceptional education, CFI viewed teachers not as being regular or exceptional. Rather,

it viewed all as being educational specialists with different areas of expertise. CFI looked at the composition of a class through the same inclusive lens. Rather than viewing the class as having regular and exceptional students, this model envisioned a single class, comprised of students having differing strengths, weaknesses and needs.

Finally, like Location Focused Inclusion, CFI assumed that adequate funds and materials would be provided to these teams of teachers so that they might maximally employ alternative instructional strategies to benefit all the students in the class.

### Summary of Key Issues

The key issues that emerged in this study revolve around a number of mutually shaping interrelationships among (a) teaching and learning, (b) school structure, and (c) school climate and culture. Historically, regular and exceptional education had been organized as two distinct entities at Malcolm X Middle School. Students who presented "deficits" were placed in self-contained exceptional education classes. In these classes, "specially" trained teachers presented lessons that were thought "appropriate" for these "identified" students. It was as if there were really two schools, one regular and the other exceptional. There was little movement of either teachers or students between regular and exceptional classrooms. What limited movement there was took place only after student "proof" of normal work and behavior. Communication between the two "schools" was sparse and often confused due to the different jargon spoken by each group. Many times exceptional classes were not even invited to school-wide events

because they were not officially on any grade level team and were simply forgotten by those in charge.

Metaphorically speaking it was a situation of exceptional education as safety valve. The banishment of low-performing exceptional students to segregated classrooms took the pressure off regular education to develop curricular and instructional strategies to meet the needs of these often hard to teach students. However, as time passed and students came to Malcolm X Middle with fewer academic and behavioral skills, standardized test scores plummeted placing Malcolm X on a state list of critically-low performing schools. This dubious distinction caused the school to look inward, and with additional assistance from the District and state, it adopted policies and structures designed to reorganize the adults on campus in the hopes that student achievement might increase.

The Comprehensive Management System and block scheduling were both introduced as means to increase collaboration and collegiality among teachers, as well as to foster the implementation of alternative instructional strategies at Malcolm X Middle. Indeed, block scheduling granted teachers greater flexibility to employ practices such as cooperative learning and peer tutoring in their classrooms. At the same time, CMS attempted to bring the faculty together to discuss issues of curriculum, instruction and behavior as well as provide teachers with training that would enable them to increase their professional effectiveness in the classroom.

However, the mere implementation of CMS did not ensure that all staff members would buy into its agenda. A strong cultural tradition of teachers working in isolated classrooms was difficult to overcome. This point was emphasized by the total opposition

regular educators in the study had towards sharing responsibility for students in their classrooms with another co-teacher. In addition, the dual organization of Malcolm X Middle, one traditional and the other innovative, created some resistance to the implementation of CMS among the faculty. Teacher's effectiveness and competency continued to be evaluated according to a nineteenth-century bureaucratic model at the same time that they were being asked to perform in a late twentieth-century collaborative mode. It seemed that the top-down, District driven initiative had not lived up to its full potential as an instrument for change. As a result the hoped for conversation between regular and exceptional education that might have resulted from this collaborative model of organization failed to materialize. It seemed that if inclusion was going to succeed at Malcolm X Middle that it would have to become an integral component of the school's agenda, not simply something that was relegated to the fringes of the school improvement plan.

At the same time that Malcolm X Middle was coping with the uncertainty and confusion brought about by these structural changes, the introduction of the Sunshine State Standards and the regulations mandated by the 1997 reauthorization of IDEA placed enormous pressure on the school to include *all* its students in the ongoing efforts to raise student achievement. It seemed as if the two separate "schools", regular and exceptional, were on a convergent course; that the demands of educational equity for exceptional students and the call for all students to achieve high, world-class standards both shared similar philosophical and practical assumptions.

No longer did it make sense to separate low-performing exceptional students from low performing regular students when similar instructional strategies were being



employed in both educational settings. This was especially true since both types of students were expected to be successful with the newly adopted Sunshine State Standards. The use of cooperative grouping, peer tutoring and series of smaller yet more frequent mini-lessons in regular as well as exceptional classrooms in the study seemed to negate the notion that exceptional educators had "special skills" in the area of instruction. Rather, it seemed to validate the old saying, "good teaching is good teaching." The question that begged answering was, if both groups of students had learning problems that resulted in teachers using similar instructional techniques --Why have separate classes?

The answer to this question took on even greater importance when federal regulations passed in 1997 emphasized the regular classroom as the preferred placement for all exceptional students. Believing that access to the regular education curriculum was the only sure means of guaranteeing exceptional students exposure to the reform efforts that were transforming those classrooms, the reauthorization of IDEA virtually ensured that additional exceptional students would be entering regular classes at Malcolm X Middle. Regular class placement for exceptional students was also a state goal and various measures were put into place to facilitate its attainment. Funding formulas were changed and accountability and public reporting measures were put into place, all encouraging the inclusion of exceptional students.

Although the present condition of inclusion at Malcolm X Middle School seems bleak, with a majority of its exceptional students still confined in self-contained classrooms, prospects for increased inclusion seem promising indeed. Structurally, Malcolm X is ideally organized to include exceptional students in its' regular classes.

Block scheduling allows flexibility in design of accommodating and challenging learning environments for all students. Comprehensive Management System grants teacher's time to meet and collaborate amongst themselves, allowing them to better meet the needs of all students in their classes. CMS also provides the training necessary for teachers to remain abreast of the latest advances in instruction and technology.

Although it hasn't yet done so, CMS holds out the promise of altering the culture of isolation that presently exists at Malcolm X Middle. Additional faculty experience with this collaborative structure might yet lead to it's fostering the creation of the learning community that is so vital to the successful inclusion of exceptional students. The time it allows for collaboration among faculty members may yet narrow the gap between regular and exceptional education at Malcolm X Middle, allowing both groups to realize that they are indeed more alike than different.

Finally, forces beyond the control of Malcolm X Middle are at work that virtually guarantee the increased inclusion of exceptional students. The 1997 reauthorization of IDEA with its focus on regular class placement and the increased demands put on schools to provide access to a rigorous curriculum to all students implicit in the Sunshine State Standards, have both increased the need for Malcolm X Middle to develop a school improvement plan in which e exceptional students play an integral role.

### Inquirer's Conclusions

Taken together, the participant's perspectives on and experiences with including exceptional students in regular classes support much of the recent empirical findings

relating to educational change. The emphasis on bottom-up, locally defined reform has shifted focus away from top-down, system-wide initiatives to the reform of individual schools and communities (Bacharach & Mundell, 1995; Fullan, 1993; Meier, 1992). A common theme found in the literature on educational change has been the call for the replacement of hierarchical structures with other more collaborative structures of decision making in schools (Rowan, 1995). In this collaborative approach, teachers would assume expanded authority in schools, collegiality among staff members would be nurtured so that information and advice regarding effective teaching practices could be shared on a regular basis and teamwork would be utilized as an inclusive device for the school. According to Conley, Schmidle & Shedd (1988) such a team-oriented approach enhances teacher commitment to decisions made, as well as the quality of the decisions made about schooling.

An important conclusion of this study is that it is extremely difficult for teachers to break with traditionally held views regarding the organization of schools and the roles teachers play in those structures. In this study the implementation of Comprehensive Management System at Malcolm X Middle School was initially viewed as being an effective means to increase the collaboration between regular and exceptional educators at the school. According to Lortie (1975) the goal of such collaboration is to break down the patterns of teacher isolation stemming from the "cellular" organization in schools. With the implementation of CMS, teachers at Malcolm X Middle finally had a forum in which they could discuss issues of school-wide as well as personal concern. However, after a year's experience with CMS an increase in conversation between regular and

exceptional educators failed to materialize and the hoped for rapprochement between regular and exceptional education did not occur.

While it would appear on the surface that CMS had failed as an instrument of educational change, literature on the effects of collegiality and collaboration indicate that its less than complete adoption by the faculty at Malcolm X Middle does not necessarily imply total failure. According to Rowan (1995), "The development of a faculty culture that reinforces the norm of continuous improvement and sustains intensive collegial interactions over a long period of time appears to be required if collegial forms of organization are to produce the intended effects" (p.28). Considering the substantial change that CMS had brought to Malcolm X Middle, it was hardly surprising that its successful implementation would require additional time and nurturing.

The less than total acceptance of CMS by all faculty members at Malcolm X Middle may also be explained by other factors. The implementation of CMS represented a fundamental change in the way that the school was organized and in the roles that teachers played. Gone was the notion of teachers working in total isolation from one another. This solitary existence had been replaced by a more collaborative and team-oriented approach that required teachers to take on more joint responsibility for policies and procedures at Malcolm X. As such, it represented a radical departure from the core practices that had previously driven decisions regarding curriculum, instruction and policy-making at the school. According to Fullan (1993, emphasis in the original):

The hardest core to crack is the learning core--changes in instructional practices and in the culture of teaching toward greater collaborative relationships among students, teachers and other potential partners. Stated differently, *to restructure is not to reculture*--a lesson increasingly echoed

in other attempts at reform. Changing formal structures is not the same as changing norms, habits, skills and beliefs. (p.49)

Apparently, the mere changing of structure at Malcolm X Middle had done little to increase the conversation between regular and exceptional education at the school. Just because the school had restructured did not mean everyone had somehow become "instant converts" to its new collaborative organization. Taylor and Teddlie (as cited in Fullan, 1993) observed similar effects in a study of a district that was widely acclaimed as a model of restructuring. Commenting on the lack of collaboration among staff members despite extensive efforts to nurture such conversation, these researchers observed, "Teachers in the study did not alter their practice... increasing their participation in decision-making did not overcome norms of autonomy so that teachers would feel empowered to collaborate with their colleagues." (p.10). Long accustomed to having responsibilities assigned, curriculum delivered in scripted teacher proof packages, and decision-making deferred to administrators, teachers at Malcolm X did not easily shed their solitary, worker-oriented roles.

Another important conclusion of this research is that it is very difficult for teachers to elude the influence of their currently held constructions regarding the role of the teacher in the classroom. Related to the durability of core practices at Malcolm X Middle is the intractable nature of schools themselves. Initial hopes that CMS would facilitate a change in the isolated culture that existed at the school diminished as confusion and uncertainty associated with the change process caused teachers to revert back to familiar practices in their classrooms. The increased amount of time that teachers planned and trained together at Malcolm X Middle seemed to have a differential effect on

classroom practices. While this collaboration and training seemed to encourage the use of alternative instructional strategies such as cooperative learning and peer tutoring, it was less successful at nurturing the team-oriented approach to instruction that is so vital to the success of including exceptional students in regular classes. According to Tyack and Cuban (1995):

For their part, teachers also had an investment in the familiar institutional practices of the school. They learned these as students, and as they moved to the other side of the desk, they often took traditional patterns of organization for granted as just the way things were. It was one thing to add on a popular innovation at the border of the school and quite another to ask teachers, faced with the task of controlling and instructing large numbers of students, to make fundamental changes in their daily routines. Because teachers retained a fair degree of autonomy once the classroom door was closed, they could, if they chose, comply only symbolically or fitfully or not at all with the mandates for change pressed on them by platoons of outside reformers. (p.9).

Apparently the notion of teams of teachers, for example co-teaching, did not coincide with the concept of how a "real school" should be organized held by the regular educators in the study. Both remained under the influence of the tradition bound conception of teachers being the solitary masters of everything that occurred in classrooms. Each took a "if it isn't broken, why fix it" attitude towards having a single teacher in the classroom.

Another conclusion of this study is that is extremely difficult for innovative practices to flourish and achieve any degree of permanency unless they are an integral part of a school's overarching vision for the future. The notion of including exceptional students into regular classes at Malcolm X Middle has been affected by a number of fundamental issues. The gulf between regular and exceptional education at Malcolm X Middle was quite apparent whether viewed in terms of student isolation, or in terms of lack of

communication and understanding between regular and exceptional educators. As a matter of fact, it appeared that many staff members at Malcolm X viewed the present drive for increased inclusion as simply one more change that they had to "put up with" and if properly ignored, might simply go away like many reforms attempts that came before it. Fullan (1993) refers to this penchant of schools to take on the latest interesting innovation without first carefully assessing it's strengths and weakness, or how it can be integrated with what is already going on as "add-onitis." Inclusion seemed to many at Malcolm X as the latest "fad", one that made little sense in their standard-driven, frenzied world.

Furthermore, these regular educators did not seem to view inclusion as being tied in any fundamental way to the ongoing efforts of Malcolm X to raise the academic achievement of all its' students. Commenting on the many ad hoc innovations that teachers have historically had to endure Baker, Curtis and Benenson (1991) observed:

Planned change for these teachers is not the cumulative development of a comprehensive strategy. Rather, it is "one damned thing after another". Planned change becomes the preoccupation of the administrators who continue to try and fix the system. For teachers, change becomes a matter of coping with management's penchant for educational fads. (p.13).

That inclusion of exceptional students into regular classes might be viewed in such auxiliary, rather than essential terms is not hard to understand in light of the forces driving it's implementation at Malcolm X Middle. There was little evidence in the present study that would indicate a strong desire on the part of regular teachers to have inclusion of exceptional students become an important part of the schools agenda. Rather, all current attempts to increase inclusion at the school seem to emanate from outside sources. CMS with it's call for increased collaboration and time for planning and

the OCR Class with its overabundance of support for included students were both district driven initiatives. In addition, the current push towards regular class placement of exceptional students did not come from the schools improvement plan. Rather, it came from Washington DC in the form of regulations associated with the 1997 reauthorization of IDEA.

According to numerous educational change theorists (Brooks & Brooks, 1993; Fullan, 1991, 1993; Kreisberg, 1992) top-down reform strategies are ineffective as blueprints for change because they deny ongoing opportunities for meaning-making among individuals involved in such change. While direction and mandates from the outside sources are important because they set policy, establish standards and monitor performance, they cannot mandate what should matter to individual schools because, "What really matters for complex goals of change are skills, creative thinking, and committed action" (Mc Laughlin, 1990). Apparently, lack of internal support for the inclusion of exceptional students led Malcolm X Middle to rely solely on outside forces for its implementation. Tyack and Cuban (1995) highlight that such a situation might seriously affect the successful inclusion of exceptional students at Malcolm X Middle as they cautioned:

To the degree that teachers are out of the policy loop in designing and adopting school reforms, it is not surprising that they drag their feet in implementing them. Teachers do not have a monopoly on educational wisdom, but their first-hand perspectives on schools and their responsibility for carrying out official policies argues for their centrality in school reform efforts. (p.135).

Apparently, lack of teacher input into the inclusionary process at Malcolm X Middle had caused it to be a low priority issue. Regular educators at the school did not



link inclusion with other ongoing reform efforts and therefore did not see the need to include more exceptional students in their classrooms. So while top-down initiatives pushed for increased inclusion of exceptional students at Malcolm X Middle, a corresponding groundswell of support from the school staff did not occur. As a consequence the inclusion of exceptional students at Malcolm X has remained on the school's "back burner." Referring to the one-sided nature of many reform efforts, Pascale (1990) called for more coordination between outside agencies and local sites arguing, "Change flourishes in a 'sandwich'. When there is consensus above, and pressure below, things happen." (p.126). Fullan (1993, emphasis in the original) also argued if change was going to be successful that both top-down and bottom-up strategies would be necessary:

Put differently, the center and local units *need each other*. You can't get anywhere swinging from one dominance to the other. What is required is a different two-way relationship of pressure, support and continuous negotiation. It amounts to simultaneous top-down, bottom-up influence. Individuals and groups who cannot manage this paradox become whipsawed by the cross-cutting forces of change. (p.38).

It would seem that the successful inclusion of exceptional students into regular classes requires the development of shared values that unify all members of the school community and orient them to a common purpose. In such a manner, inclusion at Malcolm X Middle might indeed benefit from local support as well as outside mandate.

## Inquirer's Reflection on the Study

I began this study as a captive of my own past experiences. Like many of the participants in the study, I found it hard to escape the influence of my personal constructions regarding curriculum, instruction and school organization. Having been an exceptional education teacher for nearly ten years had certainly influenced my perceptions regarding the inclusion of exceptional students. To deny that I possessed such a perspective would imply that things did not matter to me in a strong and personal sense, that it would be possible to suspend my beliefs, values and visions. Such was not the case as I too shared many of the same concerns and goals of the participants in the study.

I began the study looking at the process of inclusion through an exceptional education lens. This was an unavoidable situation considering my professional background. Like the other exceptional teachers in the study I was concerned about the behavior of exceptional students and how it might possibly prevent them from being included in a regular class. I was concerned about the support, or more precisely the lack of it, that exceptional students had actually received in regular classrooms at Malcolm X Middle. I was concerned about the ability of exceptional students to meet the higher standards brought about by the Sunshine State Standards. Essentially, I perceived inclusion to be an exceptional education issue, totally disconnected from other reform efforts that were being attempted at Malcolm X Middle.

As my conversations with the participants continued and observations were made in various classrooms the notion of inclusion as being an issue solely for exceptional

education seemed to make increasingly less sense. The mutually shaping relationship between myself and the participants began challenging my assumptions and beliefs regarding inclusion. It gradually dawned on me that when we spoke of *all* students being given increased chances to succeed, that *all* students needed to meet higher standards, that *all* students needed to be included in the life of the school, that we were speaking about regular as well as exceptional students. Closer contact with regular educators led me to realize that they shared many of the concerns that exceptional teachers had regarding academics and behavior at Malcolm X Middle.

Gradually, I came to view inclusion not as a *product*, but as the attainment of regular placement for exceptional students. I began to understand that what was really important was the *process*, what forces actually were involved in its successful implementation? Certainly structure was involved. CMS did provide time for collaboration and planning. Block scheduling did allow innovative instructional strategies to flourish. However, I gradually came to see that what was really needed for inclusion to succeed at Malcolm X Middle was the creation of a school community that cherished diversity, not shunned it. Rather than viewing inclusion as being "exceptional" students in "regular" classes, we simply need to acknowledge that *all* students, regular as well as exceptional, have different strengths and weaknesses and deal with these students in singular, not dual settings. I have come to believe that inclusion will succeed to the extent that we are able to create schools in which everyone feels that they belong, are accepted, and are supported by their peers and have their educational needs met. Kunc (1992) eloquently describes such a place:

The fundamental principle of inclusive education is the valuing of diversity within the human community. Every person has a contribution to offer the world. Yet in our society we have drawn narrow parameters around what is valued and how one makes a contribution. When inclusive education is fully embraced we abandon the idea that children have to be "normal" in order to contribute to the world. Instead we search for and nourish the gifts that are inherent in all people...In this way, it is conceivable that the students in inclusive schools will liberate themselves from the tyranny of earning the right to belong. It is ironic that the students who were believed to have the least worth and value may be the only ones who can guide us off the path of social destruction. (p.38).

In the end, I have been able to shed the confinement of previous personal constructions regarding inclusion and have come to see that inclusion does not mean "fixing" exceptional education or increasing "mainstreaming." Rather, inclusion means developing schools and classrooms that fit, nurture and support the educational and social needs of all students.

### Recommendations for Further Research

Based upon Malcolm X Middle's contradictory experience with implementing educational change, there appears to be a great need for further research that examines the everyday lives that teachers lead outside their classrooms. While the classroom is certainly the dominant setting for teacher's daily professional life, it is not the only context for their work (Louis, Marks & Kruse, 1996; Siskin, 1994). The organization of a school and the other faculty members they must interact with comprise the larger context within which individual teachers must work. In the present study, it was this larger school context that had the greatest impact on teacher's views of themselves as professionals and ultimately on the inclusion of exceptional students.

Increasingly, many voices contend that teacher professionalism must increase if education is to improve (Currey, Wergin & Associates, 1993; Maeroff, 1988). While individual professionalism is important within the context of singular classrooms, attention needs to be paid to the development of professional communities, or teacher's collective engagement in sustained efforts to improve practice and forge shared visions. (Fullan 1991, 1993; Lieberman, 1991; Sergiovanni, 1992, 1996). While great emphasis has been placed on studying the effects that restructuring has had on individual classrooms, less emphasis has been placed on studying the needs teachers have for sustained professional contact with colleagues (Louis & King, 1993).

It is my firm belief that the most effective approach to studying these teacher communities is one that is collaborative in nature. The strength of such an approach is derived from its focus on people and situations, and it's emphasis on words rather than numbers. In such a manner, the multiple perspectives of teachers may be taken into account as they attempt to make sense of these emerging learning communities. Lieberman (1986) has envisioned such collaborative research as "working with, not working on..." (p.28). That such collaborative types of inquiry have the power to increase the professionalism of teachers, a component thought to be so critical for the success of restructuring efforts, is emphasized in a description of action research given by Altrichter, Posch and Somekh (1993):

These teachers have not only carried out development work for their schools but have also broadened their knowledge and professional competency. They have passed on this knowledge to colleagues, students, parents, and in written form, also to the wider public. They have shown that teachers can make important contributions to the knowledge base of their profession. And they have demonstrated that they can engage

successfully with professional problems without recourse to external direction. (p.5).

As schools become more collaborative and inclusive in nature the need for researchers to place themselves in these socially complex situations has taken on a greater sense of importance. According to Maxwell (1996) collaborative studies are well suited to understanding the meaning, for participants in the study, of events, situations, and actions they are involved with, and of the accounts that they give of their lives and experiences. Further lines of study need to take advantage of this power of collaborative research to more fully describe and explain the everyday lives of teachers as they interact with other colleagues in the context of the larger school setting.

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## APPENDIX A

### LIST OF DOCUMENTS REVIEWED

#### District Documents

1. School Board of Broward County, Data Sheet, SBBC Statements and Priorities.
2. School Board of Broward County, Data Sheet, About BCPS.
3. School Board of Broward County, Data Sheet, Innovation Zones.
4. School Board of Broward County, Memorandum, New Duties Under the Individuals with Disabilities Act (IDEA) 1997.
5. School Board of Broward County, Q&A Sheet, OCR Questions and Answers.
6. School Board of Broward County, Resolution, Broward's Response to OCR Compliance Review.
7. School Board of Broward County, Meeting Summary, Community of Learners for Inclusion, Summary of January 27, 1993 Meeting.
8. School Board of Broward County, Retreat Summary, Inclusion Discussion Outline, School Board Retreat, October 25, 1994.
9. School Board of Broward County, Needs Assessment, Recommendations for Malcolm X Middle School.
10. School Board of Broward County, Change Matrix, Malcolm X Middle School, Readiness to Change Matrix-Compilation.
11. School Board of Broward County, Survey, Improving Our Schools, Malcolm X Middle, The 1996-97 Customer Survey, Student, Parent & Teacher Perspectives.
12. School Board of Broward County, Report, 1997-98 School Accountability Report for Malcolm X Middle School.

13. School Board of Broward County, Staff Development Calendar, ESE Inservice Calendar 1998-99.
14. School Board of Broward County, Plan, Focus 2000, 1999-2000 School Improvement Plan.
15. School Board of Broward County, Data Sheet, 1998 Stanford Achievement Test, Eighth Edition Middle School Scores.
16. School Board of Broward County, Data Sheet, Middle Schools: Florida Writing Assessment.
17. School Board of Broward County, Database, 1998-99 List of ESE Students Malcolm X Middle School.
18. School Board of Broward County, Fact Sheet, How Does Inclusion Fit With Reform
19. Comprehensive Management System, Notes from January 7, 1997 meeting with staff members at Malcolm X Middle School.

#### State Documents

1. Florida Department of Education, Improvement Plan, Blueprint 2000 A System of School Improvement and Accountability. (1991, 1994).
2. Florida Department of Education, Action Plan, Strategy VIII Action Planning Team Inclusion.
3. Florida Department of Education, Resource Guide and Training Manual, Least Restrictive Environment Decision Making: Practical Decisions for Functional Practices.
4. Florida Department of Education, Report, Florida School Indicators Report 1996-97.

5. Florida Department of Education, Report, 1996-1997 End of the School Year Report For Schools with Critically Low Student Performance.
6. Florida Department of Education, Improvement Plan, The Basics of School Improvement and Accountability in Florida. (1996-1997).
7. Florida Department of Education, Handbook, Sunshine State Standards. (1996).
8. Florida Department of Education, Research Report, Evaluating Effectiveness, Usefulness, Practicality of Cooperative Consultation. (No. 10, 1989).
9. Florida Department of Education, Research Report, Cooperative Consultation Regional Training. (No. 12, 1990).
10. Florida Department of Education, Handbook, Matrix of Services Handbook (1998).

#### Federal Documents

1. United States Department of Education, Q&A Guide, Questions and Answers on the Least Restrictive Environment Requirements of the Individuals with Disabilities Education Act. (1994).
2. United States Department of Education, Online Report, IDEA Report to Congress. (1998).
3. United States Senate Report, 20<sup>th</sup> Annual Report to Congress on the Implementation of IDEA.

## APPENDIX B

### LIST OF INITIAL INTERVIEW QUESTIONS

1. Tell me what you know about inclusion.
2. Can you describe the general characteristics of an exceptional student?
3. Tell me about a typical day in your classroom.
4. How do you feel about team-teaching? Co-teaching?
5. Tell me about the support you receive in your classroom.
6. How do feel about block scheduling?
7. Tell me how you feel about Comprehensive Management System (CMS)?



## APPENDIX C

### LIST OF FOLLOW-UP INTERVIEW QUESTIONS

1. What instructional practices have a positive impact on exceptional students in regular classes? What instructional practices have a negative impact on exceptional students in regular classes?
2. What resources (material, human, or financial) are necessary for including exceptional students in regular classes?
3. Do you consider teachers to be true professionals?
4. In what ways does this school treat teachers in a professional manner? In what ways does it treat teachers in a non-professional manner?
5. Do you believe the organization / structure of this school (i.e. how your day is structured and scheduled) enables or hinders your ability to act professionally?
6. Do you believe the culture (i.e. the values and beliefs held by staff members) of this school enables or hinders your ability to act professionally?
7. Do you believe that your view of yourself as a professional has any impact upon your ability to include exceptional students in a regular class?
8. Do you believe the structure / culture of this school has any impact on the inclusion of exceptional students in regular classes?

APPENDIX D

INFORMED CONSENT

MIDDLE SCHOOL TEACHERS PERSPECTIVES ON INCLUSION:  
A QUALITATIVE STUDY

I freely and voluntarily consent to be a participant in the research project entitled Middle School Teachers Perspectives on Inclusion; A Qualitative Study to be conducted at Florida International University during the Spring semester, 1999, with James Cooney as Principal Investigator. I have been told that this experiment will last approximately 6 months.

I understand that the purpose of this research is to describe and explain the perspectives on inclusion held by a group of middle school teachers. In order to accomplish this goal I understand that I will participate in both classroom observations and individual interviews with the Principal Investigator.

I understand that there are no known risks or benefits involved in my participation in this experiment. I have been told that my responses will be anonymous and that there will be approximately 6 respondents in the total sample for this study.

I understand that I may withdraw my consent and discontinue participation in this research project at any time with no negative consequences. I have been given the right to ask questions concerning the procedure, and any questions have been answered to my satisfaction.

I understand that if I desire further information about this research I should contact Dr. Valerie Janesick at 954 762 5282. I have been offered a copy of this informed consent form.

I have read and I understand the above.

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Participant's Signature

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Date

I have explained and defined in detail the research procedure in which the participant has agreed to participate, and offered him / her a copy of this informed consent form.

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Principal Investigator's Signature

---

Date

## VITA

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### JAMES M. COONEY

September 22, 1951      Born, Brooklyn, New York

#### Professional Experience

1973      B.S., Psychology  
State University of New York  
Oneonta, New York

1975      Elementary Teaching Certification  
State University of New York  
New Paltz, New York

1992      M.A., Special Education  
New Jersey City University  
Jersey City, New Jersey

1990-1992      Exceptional Student Education Teacher  
Emotionally Handicapped  
Junior High School 25  
New York, New York

1992-1993      Exceptional Student Education Teacher  
Specific Learning Disabilities  
Pompano Beach Middle School  
Pompano Beach, Florida

1993-1998      Exceptional Student Education Teacher / Department Chair  
Educable Mentally Handicapped  
Seriously Emotionally Handicapped  
William Dandy Middle School  
Fort Lauderdale, Florida

1998-1999      Behavior Support Teacher  
Dillard Innovation Zone  
Fort Lauderdale, Florida

Professional  
Organizations

Council for Exceptional Children  
Association for Supervision and Curriculum Development

Other Experiences

1976

Carpenter--San Francisco, California

1977-1978

Travel--Central and South America

Teacher--English as a Foreign Language  
San Jose, Costa Rica

1978-1990

General Manager--Textile Corporation  
New York, New York