



basic education

Department:
Basic Education
REPUBLIC OF SOUTH AFRICA

REPORT ON THE INCLUSIVE EDUCATION FIELD TEST: 2004 – 2009

PRESENTED TO THE HEADS OF EDUCATION COMMITTEE

2009

1. Introduction

In 2004, the Department of Education issued a tender for field-testing the implementation of Education White Paper 6: Building an Inclusive Education and Training System. The CSIR was appointed to undertake the overall project management of the field test, the Sisonke Consortium for the Human Resource Development Programme while a consortium led by the South African National Council for the Blind was responsible for the Provisioning of Material Resources and Assistive Technology.

Education White Paper 6 established an implementation trajectory which had as its first stage, the field test that would be conducted in 30 selected districts targeting 30 selected special schools and 30 selected full-service schools. In 2004 the Minister of Education declared that the field test would be extended to 2009. Donor funding from Sweden and Finland would be used to carry out all activities of the field test. Service providers supported the Department of Education at various levels throughout the field test to ensure sustainability of the implementation of the Education White Paper 6. The service providers were accountable to the General Education Branch with delegated functions carried out by the Inclusive Education Directorate. Directorates such as GET Schools, School Management and Governance, Early Childhood Development, District Development, Teacher Development, as well as Physical and Financial Planning also had a role to play in the process.

This report presents deliverables of the CSIR, the Sisonke Consortium as well as a report on the first stage of the SANCB-led Consortium that was awarded the tender for the Provision of Material Resources to Special and Full-Service Schools. The report further makes recommendations for the full-scale implementation of the policy on Inclusive Education.

2. Deliverables

The following six objectives were set for the field test of White Paper 6 for completion at the end of 2009:

- **Objective 1:** The qualitative improvement of 30 selected **special schools** and their conversion into resource centres to support mainstream schools;
- **Objective 2:** Overhauling the process of identifying, **assessing** and enrolling learners;
- **Objective 3:** A national **advocacy** and information programme to support the implementation of the inclusive education policy and to ensure the expansion of access and provision, involving the mobilisation of ‘out-of-school’ disabled children and youth of school-going age;
- **Objective 4:** The establishment of **full-service schools** – at least one primary school per selected district was designated for conversion to a full-service school which included being provided with necessary resources to accommodate a diverse range of learning needs;
- **Objective 5:** The provision of support for **curriculum development and assessment**, in all a and institutional development;
- **Objective 6:** Strengthening **education support services** by establishing district- and institution-level support structures to provide coordinated support to all schools.

These deliverables were to be achieved partly through contracted service providers but also by the General Education and Systems Planning Branches of the Department, through ongoing engagement with the processes and outcomes of the field test.

3. Achievements

Achievements of the Field Test are reported per objective.

Objective 1: Special Schools and Special Schools as Resource Centres

- In strengthening special schools, areas of neglect were identified leading to the conclusion that not all special schools could be resource centres.

- Special schools were reoriented on their new role as resource centres through the use of the rights-based approach, thus eliminating resistance and fear of change.
- *Guidelines to Ensure Quality Education and Support in Special Schools and Special School Resource Centres (2007)* were developed in part as a response to findings of the Special School Audit of 2002 and they are to guide the process of converting special schools into resource centres and the programme for the recapitalisation of most neglected special schools. The following are some of the objectives of the Guidelines Document:
 - Outlining criteria and expectations special schools must meet to offer quality education before it can offer its services to other schools. Unfortunately, the 30 selected potential resource centres were found not to be ready to serve as resource centres hence the bid to Treasury for additional funding to address areas of further development and preparation of these special schools to become resource centres.
 - The Field Test further found that based on the Inclusive Education policy and the *UN Convention on the Rights of Persons with Disabilities* special schools need to focus on specific disabilities and not a wide range thereof so that the support they offer is specialised too; otherwise they are likely to become dumping grounds. It is therefore proposed that every special school offers highly specialised support in respect of one or two areas of specialised support, and as a resource centre, offer highly specialised support to full-service and public ordinary schools.
- A tender was also awarded to supply material resources and assistive devices to selected special schools during the Field Test. A major deliverable of the tender was to put in place a system to assess, manage and maintain the devices, a system that will be provided to provinces. Provinces have also been invited to take part in the tender using the 2008 MTEF funding to expand the provision of assistive devices. An important highlight stemming from the Field Test is an urgent need to align policies and practices of the Departments of Health and Education regarding the supply of assistive devices.

Objective 2: Overhauling Screening, Identification, Assessment and Support (SIAS) strategy for assessing for barriers to learning and the provision of appropriate support:

- The Draft National Strategy on Screening, Identification, Assessment and Support (SIAS) formed the basis for an extensive human resource development programme that was also implemented during the Field Test. Orientation on the SIAS targeted the designated schools and involved more than 2000 educators, non-teaching staff, SGB members and officials from the district-based support teams. This was followed by site-based support visits to schools which were meaningful as it contextualised the approach and allowed teachers to test it in their own teaching environment.
- Findings indicated that the impact of the training was substantial in as far as it brought across an understanding of the core shifts in approach towards an inclusive system, and it was positively received. The limitations of the process were that key district staff such as circuit managers and curriculum advisors did not participate in this process with the exception in some provinces such as Gauteng and Western Cape.
- One of the recommendations after the orientation process was that the strategy needed to be simplified and refined. HEDCOM approved the refined strategy at the end of 2007 and recommended that it be implemented in all special schools and the selected full-service schools which would be followed by an evaluation of its practicality and effectiveness after a trial period. The evaluation was to be conducted between May and August 2009 and presented to HEDCOM in the last quarter of 2009.
- More than 5000 provincial officials, district-based support teams and institution-level support teams received extensive training on the revised SIAS in 2008. The majority of provinces involved all critical units in their districts before rolling it out to schools. The Field Test underscores the significance of building capacity at the district level and of ensuring that an institution-level support team is established in every school to eliminate referral of learners with moderate support needs to special schools but providing ongoing support and mentoring to ordinary schools and teachers.
- Reports show that there is wide spread awareness of the SIAS but application is limited to a small percentage of special and full-service schools.

Objective 3: Advocacy and expanding access for out-of school vulnerable children

- Several advocacy campaigns have been conducted since 2002. These include roadshows undertaken by the Department of Education in 2003 and 2005, three

inclusion conferences (in 2002, 2003 and 2007) as well as workshops held in provinces to train teachers and officials on White Paper 6, the SIAS document and the Guidelines for Inclusive Learning Programmes (ILP). In February 2009 13 short episodes were broadcast on SABC2 to promote awareness of Inclusive Education best practice in the country. This project was run in collaboration with GCIS.

- The Inclusive Education Website on the Thutong Education Portal provides information and promotes debate around inclusive education with relevant stakeholders.
- A Stakeholders Forum was established in 2008 and meets twice annually to provide information to stakeholders and to engage with them on key issues.
- The reports on the field test however indicate that much more discussion must be held at managerial levels of the system to ensure that all aspects of inclusive education are infused into the structures and budgets of provincial and district departments of education.
- Advocacy is also needed to ensure that the strategies being introduced are aligned to those of sister Departments such as Social Development, Health, Labour and Transport.
- Whereas there is wide-spread understanding about barriers to learning and development, the fears and negative attitudes towards disability amongst the broad public still need to be addressed. Before out-of-school youth are brought to school, parents have to trust that schools will be welcoming environments with the capacity and will to effectively support their children.

Objective 4: Full-Service Schools

- Conversion of 30 selected ordinary primary schools to full-service schools and making them environmentally accessible to learners with disabilities. The main

purpose was to create models of good inclusive ethos and practice which could serve as examples for other schools also to become inclusive.

- All teachers in Full-Service Schools have received an orientation and basic training in Inclusive Education, but more training is required, including part-time courses in Inclusive Education at relevant universities as part of the teacher development strategy.
- Provincial Education Departments are responsible for the environmental accessibility of schools. Due to institutional arrangements in provinces, serious delays were experienced such that only in 2008 was remarkable progress made in the physical upgrading of the schools: J. D. Crawford in Beaufort West (Western Cape), Ebhotwe in Mdantsane (Eastern Cape) Mokgalabe in Sekukhune and Tshisaulu In Vhembe (both in Limpopo) and Sondelani (in KwaZulu Natal) were completed by the end of 2009. It is anticipated that the remaining schools, Letlotlo in the Free State and Tenteleni in Mpumalanga would be completed in 2010. The remaining schools of the first 30 designated schools will be completed through provincial infrastructure programmes. The findings of how best to make schools accessible will inform infrastructure norms for all schools in future.
- It is intended that a formal launch of a full-service school be organised as part of the Inclusive Education Advocacy Strategy.
- Guidelines for Full-Service/ Inclusive Schools were completed based on lessons learnt during the Field Test.
- An Environmental Access Guide has been developed for incorporation into Infrastructure Norms on universal design and environmental access.

Objective 5: Development of Guidelines for Inclusive Learning Programmes (ILP) to improve the quality of classroom practice through providing guidelines for differentiating and adapting the curriculum and assessment processes:

- Guidelines for Inclusive Learning Programmes were developed in 2005 on which 2000 district officials and educators were trained in 30 special schools and 30 full-service schools in 2006/7 as part of the field test.
- Training was well received and valuable inputs were made by participants and these were used to refine the guidelines. The revised Guidelines, now called Guidelines for Inclusive Teaching and Learning, were also completed and presented to the Curriculum Coordinating Committee in 2009. The Guidelines are supposed to be a resource for all curriculum developers working on improving or revising the National Curriculum Statement.
- Educators in full-service schools expressed concerns about the number of learners who may require individual support plans (ISPs) within overcrowded classrooms. Statistics however show that only a small percentage of the population requires such individual support. Also, once teachers have a few ISPs, they will easily make adaptations for other learners. These findings however suggest that educators in full-service and mainstream schools will need strong support in the area of curriculum differentiation, starting with institution-level support teams as a core support mechanism at school level.

Objective 6: Strengthening support services at district and school level (District Based Support Teams and Institution Level Support Teams)

- Reports show that 27 (90%) of the designated 30 districts have established District Based Support Teams (DBSTs).
- It was reported from the Human Resource Development Programme that attendance of the DBSTs to the training on the two main strategies of Inclusive Education, the SIAS and ILP, was high in most provinces. Concerns that were however raised during the training include the limited participation by the Curriculum and Institutional Development units in districts and that the training did not translate to school level support. This suggests that a lot of developmental work still needs to be done with DBSTs.

- The capacity of DBSTs has however been expanded through capacity building programmes and advertisements of posts to be filled. This has been more pronounced in the Eastern Cape and KwaZulu-Natal.
- Support at school level has been expanded through ongoing training at selected cohorts of schools and the appointment of itinerant learning support, social support and counselling facilitators (KwaZulu Natal and Eastern Cape), these interventions going beyond the selected schools in the provinces.
- The majority of schools in KwaZulu-Natal, Western Cape and Mpumalanga have established institution-level support teams. Numbers involved will be established through ongoing monitoring and support in these and other provinces.
- Findings further point to the fact that KwaZulu-Natal, Western Cape, Northern Cape and Mpumalanga have established DBSTs in all districts, not only in the selected ones. This is an indication that the concept of district support has been embraced.
- In the majority of cases it has been reported that officials outside of the Inclusive Education units in districts do not see the work of the DBST as their core function. The work is viewed as an add-on and can only be carried if other duties allow space for it. It would therefore be critically essential that roles of DBSTs be escalated to policy level. .
- A detailed analysis of the composition, function and efficacy of the 30 DBSTs is currently being undertaken.

4. Challenges

A number of challenges facing the Education system emerged during the field test and are highlighted hereunder:

- The process of converting mainstream schools to full-service schools was extensively delayed and challenging. This resulted in the main from the fact that

the DoE relied on the Department of Public Works for delivery of infrastructure upgrading. Since the selected schools were not included in infrastructure projects and priorities of the provincial Physical Resource Planning units, they could not be incorporated in the infrastructure priorities of Public Works but were dealt with as side projects.

- Lack of capacity in the Inclusive Education Directorates at national, provincial and district levels as well as high staff turn-over impacted negatively on the delivery of the field test. This was exacerbated by the general shortage of specialist professionals such as therapists, more so in rural settings, thus critically limiting access to services for learners experiencing barriers to learning and the overall implementation of the SIAS strategy. Further to this is the fact that the Inclusive Education Directorates are structured differently in different provinces.
- Glaring disparities in the resourcing, particularly of special schools across provinces pose a major challenge in the conversion of selected special schools to Resource Centres.
- Educators in most special schools did not participate in the National Curriculum Statement training. This posed a challenge during the training of educators from the 30/30 schools on the Guidelines for Inclusive Learning Programmes as they needed mastery of the curriculum before they could be trained on differentiation and adaptation. There is also a general complaint on the part of most special schools that they are not supported on a regular basis by district officials, specifically curriculum advisory services.
- It must be acknowledged that the deep conceptual change that is required to adapt to an inclusive education system, is not a linear process and that there are complexities as participants at all levels of the system engage with shifts in knowledge and understanding. The main challenge is to create space and support for such engagement (Sisonke Research Report).

- The absence of norms for resourcing an Inclusive Education system impacts negatively on the efforts to developing an Inclusive Education and Training system. The current Programme 4 structure for budgeting only caters for special schools which happen to be a sub-component of Inclusive Education.

5. Funding

The main source of funding for the field test was donor funding from Finland and Sweden. A budget of R54 924 680 was allocated to this process.

6. Recommendations

Based on the findings and challenges highlighted in the reports, the following recommendations were put forward:

6.1 Transversal Implementation of Inclusion

The impact of the Field Test was restricted in that the transversal collaboration at national level was not effectively mirrored at provincial level. Where this did happen (as in KwaZulu Natal, Western Cape and Gauteng) progress was more significant. From the reports, it is recommended that transversal teams be established in a manner that ensures representation of all critical directorates/units at all levels in the system for effective and successful further rollout of Inclusive Education.

6.2 Systemic Planning

Systemic planning which includes proposals for the development of provincial implementation plans, financing, monitoring and evaluation mechanisms will be the most critical next stage. Indicators developed during the Field Test can be considered for future monitoring processes. One of the proposals for further collaboration with Finland is in this area.

6.3 Human Resource Development

Human Resource Development that focused on understanding and clearly defining roles of the DBSTs and ILSTs to implement the key strategies namely, the National Strategy on Screening, Identification, Assessment and Support (SIAS) and The Guidelines on Inclusive Learning Programmes (ILP) was achieved.

Against this background, it is recommended that the Human Resource Development Strategy for Inclusive Education be institutionalised and integrated into the HRD strategy of the system. In the process, School Governing Bodies and DBSTs must be tasked to ensure that ongoing school-based HRD takes place. Further to this, the DoE should prioritise the training and development of educators in the areas of inclusion both at IPET and CPTD levels. It is critical that all teachers receive training in the key implementation strategies of inclusive education at both IPET and CPTD levels. Higher Education Institutions should also reinstitute courses in areas of specialisation such as teaching of learners who are Deaf, Blind and with Autistic spectrum disorders.

As an incentive, teachers who are skilled in inclusive strategies should become senior and master teachers as well as coordinators of institution-level support teams.

6.4 Physical Resources and Environmental Access

The challenges experienced in the process of converting existing primary schools into full-services schools must be seriously considered including reasons for the delays. The future conversion of full-service schools must be a key component of provincial infrastructure planning and programmes. Planning for environmental access must be incorporated into all infrastructure planning at national and provincial levels. National guidelines for ordinary and special schools and special schools resource centres must incorporate the findings of the Field Test. Capacity building programmes must be introduced to physical planners and professional teams involved in school building projects. More effective quality control measures must be instituted and existing contractual arrangements with

Implementing Agents be reviewed with a view to ensuring timeous and quality infrastructure delivery.

6.5 Material Resources

The standardisation of the procurement process of highly specialised devices, the development of specifications, approaches for effective supply at provincial level, the establishment of assessment systems and the appointment of provincial project managers are the critical next steps. Sound monitoring and tracking systems for the supply of devices (including EMIS and Lurits systems) must be introduced. Policies of the Departments of Education and Health must be aligned through a process of consultation.

6.6 Advocacy

The importance of getting out consistent and concise messages that would change not only practice at schools, but also attitudes of society at large, needs to be acknowledged and prioritised. This should be ensured through the use of professional media.

6.7 Systemic Changes Through Development of Norms

For further rollout phases of Inclusive Education the reports propose the following four pillars in the implementation of Inclusive Education as reconceptualised: Human Resources, Teaching and Classroom Support; Physical Resources, Infrastructure Maintenance and Transport; Material Resources and Infrastructure, Systems of Sourcing and Supplying; as well as Advocacy, Learner and Peer Relationships. This reconceptualisation of the pillars will provide clarity and eliminate gaps in the provision of support to institutions based on the pillars. It must be acknowledged that the implementation of the reconceptualised pillars hinges on the development of norms. The proposed development of Norms for Funding Inclusive Education should be coupled with a restructuring of Programme 4, which so far focuses on special schools.

Whereas White Paper 6 proposes that the conversion of mainstream schools to full-service schools should start with primary schools, the Field test recommends that guidelines be developed in such a way that institutions at whatever level of education could use those guidelines in their processes of converting institutions to inclusive ones.

6.8 Up-scaling of the Implementation of White Paper 6

The reports make critical recommendations for the consolidation and up-scaling of the programme in all districts and to an additional cohort of full-service and special school resource centres. One of the main challenges experienced has been the lack of capacity in the District-based Support Teams to ensure the establishment of Institution-level support teams in all schools in their jurisdiction, and the ongoing training, mentoring and monitoring of teachers and school managers as they implement what has been learned in the various orientation sessions. There needs to be a broader understanding of the importance and role of a wider range of units within the district office that have to be held responsible for monitoring the implementation of all aspects of the policy from admissions to management of inclusive schools, classroom practices and methodologies, curriculum support, early identification and intervention, parent mobilisation and resource provisioning.

The Department of Education, in collaboration with the relevant provincial directorates will be developing norms for funding and post provisioning in accordance with the Funding Principles for Inclusive Education, in the course of the next three months. Provinces are further required to ensure that the MTEF funds which have been made available for capacity building are secured for this purpose only.

