Assisting Foundation Phase teachers to implement inclusive education in the classroom: A Participatory Action Learning and Action Research (PALAR) approach

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Faculty of Education

of the

North-West University

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University number: 13639866

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Declared before me on this 11th day of November 2015

Commissioner of Oaths: __________________________
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NWU (Potchefstroom Campus)

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Kind regards

Ms Elrene van Deemter
BA, MEd, UED
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- The North-West University for the opportunity to complete the research project.

I thank you all.

And ultimately:

To Him be the glory
ABSTRACT

The study is a twofold journey of professional learning. Firstly, it endeavoured to engage Foundation Phase (FP) teachers in a participatory action learning and action research (PALAR) design, in order to adapt the study material of a distance Advanced Certificate in Education (ACE) programme in Learner Support and, concurrently, to develop a scholarship of teaching and learning in order to improve the implementation of inclusive education of a wider body of FP teachers. Secondly, it endeavoured to improve my own scholarship of teaching and learning in my academic practice as a teacher of inclusive education at a Higher Education Institution (HEI) through facilitation and participation in the PALAR design. The study is epistemologically embedded in a critical, transformative paradigm to generate data through open-ended questionnaires, reflective diaries, purposeful discussions and classroom observations. The qualitative research took place in two phases and four cycles. Phase 1 of the study was explorative by nature to determine how the FP teachers who were enrolled in the ACE programme conceptualise inclusive education as well as to understand the problems they face in practice on a daily basis regarding the implementation of inclusive education. Fifty FP teachers enrolled for an ACE in Learner Support took part in phase 1. Phase 2 occurred with eight participants, all FP teachers from the same school. The researcher and participants formed an action learning set. The action learning set worked in four iterative cycles. These cycles led us from a vision of how to improve an ACE in Learner Support programme from a predominantly theory-based content to include a more practical element by emphasising the application of the theoretical knowledge in order to enact a more inclusive classroom. Congruently, a scholarship of teaching and learning was developed. Since these transformations resulted in the adaptation of the study material of the ACE in Learner Support, it could have a positive impact on a wider body of in-service teachers enrolling for further studies in a similar programme. The experience of the action learning set made the participants aware of the value of collaboration as well as of their own critical reflection skills, with the aim to develop scholarship in teaching and learning for life-long learning and, consequently, to become better at the implementation of inclusive education.

Limitations of the research were the small sample and the qualitative mode of data gathering, which limited the findings in the sense that it cannot necessarily be generalised to other contexts. A further initial challenge was for the participants to accept me as not their lecturer, but a participant in the action learning set. The limited literature on inclusive education within a South African context also served as a limitation in this research.
Hierdie studie het uit ‘n tweeledige verkenning van professionele leer bestaan. Eerstens is daar ondersoek ingestel na hoe grondslagfase-onderwysers (GF) betrek kan word om kundigheid te ontwikkel wat hulle in staat sal stel om die praktiese implementering van inklusiewe onderrigteorie in die klaskamer te verbeter. Die aannames was dat so ‘n verbetering deur ‘n ontwerp vir participatory action learning and action research (PALAR) ontwerp bereik kon word.

Tweedens wou ek my eie kundigheid van onderrig en leer in my akademiese praktyk as ‘n onderriggewer in inklusiewe onderwyse verbeter. My aannames was dat hierdie doelstelling bereik kon word deur die fasilitering van en deelname aan die PALAR-ontwerp. Die studie is epistemologies in ‘n kritiese, transformerende paradigma ingebed om data te genereer deur oopeinde-vrae, refleksiewe dagboeke, doelgerigte besprekings en klaskamerwaarnemings. Die kwalitatiewe navorsingsbenadering het in twee fases en vier siklusse plaasgevind. Fase 1 van die studie was verkennend van aard en het probleme wat onderwysers daagliks met die implementering van inklusiewe onderwyse ondervind, in praktyk ondersoek. Vyftig GF-onderwysers wat vir die Gevorderde Onderwyssertifikaat (GOS) in Leerderondersteuning ingeskryf is, het aan fase 1 deelgeneem. In fase 2 was daar acht deelnemers, almal onderwysers van dieselfde skool. Ek en hierdie onderwysers het saam ‘n aksieleergroep gevorm wat in vier herhalende siklusse gewerk het. Deur hierdie siklusse het ons duidelikheid gekry oor aanpassing van die GOS-program in Leerderondersteuning wat hoofsaaklik ‘n teoretiese benadering getoon het, om ‘n meer prakties-gebaseerde element te bevat wat die toepassing van teoretiese kennis in die inklusiewe klaskamer sou moontlik maak. Die fokus was om die kundigheid in leerderondersteuning onder die groter groep in-diensonderwysers te ontwikkel.

Die ervarings van die aksieleergroep het die deelnemers bewus gemaak van die waarde van samewerking en positiewe nadenke oor die self, met die doel om kundigheid in onderrig en leer te ontwikkel met die oog op lewenslange leer en om terselfdertyd beter te presteer met die implementering van inklusiewe onderrig. Beperkings in die studie was die klein populasiegroep en die kwalitatiewe metode van data versameling. Dit het die studie beperk tot die praktyk waarbinne die navorsing plaasgevind het. ‘n Verdere uitdaging was my aanvaarding as ‘n deelnemer, en nie ‘n dosent, binne die aksieleergroep. ‘n Gebrek aan relevante Suid-Afrikaans gekontekstualiseerde literatuur oor inklusiewe onderwyse, was ‘n verdere leemte in die studie.
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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>ACE</td>
<td>Advanced Certificate in Education</td>
</tr>
<tr>
<td>ADE</td>
<td>Advanced Diploma in Education</td>
</tr>
<tr>
<td>AL</td>
<td>Action Learning</td>
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<tr>
<td>AR</td>
<td>Action Research</td>
</tr>
<tr>
<td>CAPS</td>
<td>Curriculum and Assessment Policy Statements</td>
</tr>
<tr>
<td>CESM</td>
<td>Classification of educational subject matter</td>
</tr>
<tr>
<td>DBE</td>
<td>after 2007 Department of Basic Education</td>
</tr>
<tr>
<td>DBST</td>
<td>District Based Support Team</td>
</tr>
<tr>
<td>DHET</td>
<td>Department of Higher Education and Training</td>
</tr>
<tr>
<td>DoE</td>
<td>Before 2007 Department of Education</td>
</tr>
<tr>
<td>EFA</td>
<td>Education for all</td>
</tr>
<tr>
<td>ELSEN</td>
<td>Learners with special needs</td>
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<tr>
<td>FP</td>
<td>Foundation Phase</td>
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<td>Gr.</td>
<td>Grades</td>
</tr>
<tr>
<td>HDT</td>
<td>Holistic dialectic thinking</td>
</tr>
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<td>HEI</td>
<td>Higher Education Institutions</td>
</tr>
<tr>
<td>ILST</td>
<td>Institution-Level Support Team</td>
</tr>
<tr>
<td>ISP</td>
<td>Individual support plans</td>
</tr>
<tr>
<td>MRTEQ</td>
<td>Minimum Requirements for Teacher Education Qualifications</td>
</tr>
<tr>
<td>NAPTOSA</td>
<td>National Professional Teachers' Organisation of South Africa</td>
</tr>
<tr>
<td>NCESS</td>
<td>National Committee on Education Support Services</td>
</tr>
<tr>
<td>NCS</td>
<td>National Curriculum Statements</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Definition</td>
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<tr>
<td>--------------</td>
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<tr>
<td>NCSNET</td>
<td>National Commission on Special Needs in Education and Training</td>
</tr>
<tr>
<td>NEEDU</td>
<td>National Education Evaluation and Development Unit</td>
</tr>
<tr>
<td>NQF</td>
<td>National Qualification Framework</td>
</tr>
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<td>NSNP</td>
<td>National School Nutrition Programme</td>
</tr>
<tr>
<td>NWU</td>
<td>North-West University</td>
</tr>
<tr>
<td>ODL</td>
<td>Open Distance Learning</td>
</tr>
<tr>
<td>PALAR</td>
<td>Participatory Action Learning and Action Research</td>
</tr>
<tr>
<td>PDOU</td>
<td>Planning and Delivery Oversight Unit</td>
</tr>
<tr>
<td>PGDip</td>
<td>Post Graduate Diploma</td>
</tr>
<tr>
<td>SACMEQ III</td>
<td>The Southern and Eastern Africa Consortium for Monitoring Educational Quality</td>
</tr>
<tr>
<td>SAHRC</td>
<td>South African human Rights Commission</td>
</tr>
<tr>
<td>SBST</td>
<td>School Based Support Team</td>
</tr>
<tr>
<td>SIAS</td>
<td>Strategy on Screening, Identification, Assessment, and Support</td>
</tr>
<tr>
<td>SNE</td>
<td>Special educational needs</td>
</tr>
<tr>
<td>SNA 1</td>
<td>Support Needs Assessment form no. 1</td>
</tr>
<tr>
<td>SNA 2</td>
<td>Support Needs Assessment form no. 2</td>
</tr>
<tr>
<td>UNESCO</td>
<td>United Nations Educational, Scientific and Cultural Organization</td>
</tr>
<tr>
<td>UODL</td>
<td>Unit for Open Distance Learning</td>
</tr>
<tr>
<td>WHO</td>
<td>The World Health Organisation</td>
</tr>
<tr>
<td>WP6</td>
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CHAPTER 1: INTRODUCTION

1.1 INTRODUCTION

By employing a PALAR approach, this research aimed to assist Foundation Phase (FP) teachers enrolled in an Advanced Certificate in Education (ACE) Learner Support programme to make their classroom practice more inclusive while simultaneously developing a scholarship of teaching and learning. I will introduce the context and rationale for the research, followed by the aims and methodology. The ethical measures will be explained and, in conclusion, an overview of the chapters will be provided.

1.2 BACKGROUND AND RATIONALE

In the last two decades, as socio-economic, political, and educational transformation took place, the South African education system has increasingly moved towards concern of people who are marginalised and deprived. New policies and curricula relating to education rendered the role of the teacher as more central in the successful implementation of a non-racial and democratic culture of human rights and social justice (Engelbrecht, Green, Naicker, & Engelbrecht, 2003; Swart & Oswald, 2008).

This movement has been further mobilised by the democratic government of South Africa, which is committed to the restoration of human rights for all marginalised groups (Levitz, 1996) including learners who are still experiencing barriers to learning. This is in line with the Salamanca statement on principles, policy and practice in special education (UNESCO, 1994) which South Africa signed in 1994. In 1996 a national commission on special needs in education and training (NCSNET), as well as a national committee on education support services (NCESS), was appointed to investigate and make recommendations with regards to special needs and support services in education and training in South Africa. Findings of the report was published in 1997 (Department of Education, 2001 (DoE), forming the basis of a framework to recognise diversity and provide quality education for all, while also introducing the concept of inclusive education. A key finding of the report highlighted that previous education systems pursued the problem within-the-child, rather than focusing on the dynamic between the biological, individual and social perspectives of the problem (cf. 2.2.1.1). Regarding this influence, a report by the NCESS and NCESNET recommended a social rights model (cf. 2.2.1.2) for education where different systems, such as the social system, wider community,
local community and the individual should be in constant collaboration with one another (DoE, 1999; Bornman & Rose, 2010; Lomofsky & Lazarus, 2010; Swart & Pettipher, 2011a).

This shift in thinking (a paradigm shift) led to the drafting of the Education White Paper 6 (WP6) Special Needs Education: building an inclusive education and training system (DoE, 2001). The core principle of this document was to introduce into the curriculum the acceptance of equal rights, social justice and human rights for all learners, including learners experiencing barriers to learning. WP6 also emphasised the intention to incrementally transform the educational system to effectively respond to and support learners, parents and communities by promoting the removal of barriers to learning and participation that exist in the education system (DoE, 2001; Daniels, 2010; Lomofsky & Lazarus, 2010). WP6 further proclaims that regular schools with an inclusive orientation are the most effective in combating discriminatory attitudes, building an inclusive society and achieving education equality. This policy also places an emphasis on quality education for all learners, which affirms that schools, and specifically teachers, have to meet the diverse learning needs of all learners. In this way the government demonstrates not only its willingness, but also its obligation to promote and further develop a non-racial and democratic culture of human rights and social justice for all children (Clough & Corbett, 2000; Engelbrecht & Green, 2007; Swart & Oswald, 2008).

The challenge, however, is the buy-in and execution of inclusive education. International research, as well as South African studies, has shown that teachers have negative attitudes towards the implementation of inclusive education (Bothma, Gravett & Swart, 2000; Bornman & Rose, 2010; de Boera, Pijlb, & Minnaerta, 2011; Savolainen, Engelbrecht, Nel & Malinen, 2011). Since most in-service teachers have had their pre-service training before the introduction of inclusive education, they do not feel confident in modifying the curriculum and learning material to address the diverse needs of their learners. Similarly, they are uncertain about how to give individual learning support while also managing behavioural problems. They, therefore, feel incompetent and lack confidence in their ability to implement inclusive education practices. As a result, many teachers tend to overlook learners who experience barriers to learning (Bornman, & Rose, 2010; Ntombela, 2011; Donohue & Bornman, 2014). A positive attitude and commitment on the part of the teacher towards inclusion are all vital for the successful implementation of an inclusive education policy (Ainscow, 2005). It is, therefore, imperative that teachers are capacitated with knowledge and skills to be enabled to enact inclusive education (Swart, Engelbrecht, Eloff & Pettipher, 2002; Buell, Hallam, Gamel-McCormick & Sheer, 2010; Engelbrecht, Nel, Nel & Tlale. 2015; Engelbrecht, Nel, Smit, & Van Deventer, 2015).

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1 APA referencing style requires citations in alphabetical order. In this study, citations will be chronological to indicate the development of the argument.
Although training pre- and in-service teachers to implement inclusive education became an important strategy for the Department of Education (SA, 2001, DBE, 2011) research seems to continually find that teachers are not adequately prepared to practice inclusive education (Bothma Gravett & Swart, 2000; Greyling, 2009; Schoeman, 2012; Nel, Engelbrecht, Nel & Tlale, 2013; Donohue & Bornman, 2014). Several studies have found that teachers experience a gap between the knowledge acquired through training on inclusive education, and their ability to implement this knowledge in the classroom (Sayed, 2000; 2002; Shalem, 2003; Taylor, Muller & Vinjevold, 2003; Swart & Oswald, 2008; Shalem & Hoadley, 2009). Consequently, teachers seem to be unsure about what to teach and how it should be taught in an inclusive classroom (Balboni & Pedrabissi, 2000; Hay, Smit & Paulsen, 2001; Avramidis & Norwich 2002; Swart et al., 2002; Engelbrecht 2006; Bornman & Rose 2010). Walton and Nel (2012p 26) state that “...inclusive education at classroom, school and system levels is messy and contradictory which complicates the development of teachers to become practitioners of inclusive education ...”

To bridge this gap, various researchers (Stofile, 2008; Frankel, Gold & Ajodhia-Andrews, 2010; Ntombela, 2011; Schoeman, 2012; Nel et al., 2013) agree that a more in-depth training of teachers regarding inclusive education should be addressed as a matter of urgency by the government, as well as by Higher Education Institutions (HEI). The training should address a deeper understanding of what inclusive education entails, expanding specialised knowledge, skills and dispositions, as well as application skills (Engelbrecht, 2006; Donald, Lazarus & Lolwana, 2010; Donohue & Bornman; 2014). Hay et al., (2001) as well as Swart and Oswald (2005), assert that the central focus of teacher education in inclusive education should be on teaching approaches that are based on innovation, experimenting, risk-taking, inclusive participative relationships between different role players and reflective practice. Mezirow (2000) along with Mezirow, Taylor and Associates (2009) affirm that professional development should provide new insight, stimulate critical reflection, and further the development of an educator’s knowledge of theory and practice.

I am a lecturer in learner support programmes at the Unit for Open Distance Learning (UODL) in; inter alia, the Advanced Certificate in Education (ACE). Based on my experience of marking assignments and examination papers of in-service teachers in the ACE learning support programmes, it appeared as if these teachers were able to report on the knowledge learned, but struggled to answer questions/instructions where they had to apply the knowledge (e.g. in case studies).
The purpose of an ACE in Learner Support is for teachers to increase their knowledge and skills to enable them to support learners who experience barriers to learning and to implement inclusive education. It is, however, important that the objectives and content of such a qualification address the “situational and contextual elements that assist teachers in developing competences that enable them to deal with diversity and transformation” (DBE, 2011, p.10). I realised, therefore, that it is vital for me to have a complete understanding of the world and environment in which the wider body of in-service teachers (students in this programme) teach and function on a daily basis in their classrooms, in order to fully grasp the values, assumptions and beliefs underpinning their practice and teaching methods. If I am not familiar with the wider body of in-service teachers’ context, my teaching could become counterproductive since it is not in tune with the changing times and the impact that those changes might have on the teachers’ context (Daniels, 2007; Von Frankl, 2008). This can result that the wider body of in-service teachers’ does not gain much from the learning experience (Mayo, 2010; Hutchings et al., 2011) since I am only transferring knowledge (Freire, 1970) and I am missing the opportunity to develop scholarship (through a PALAR process) for lifelong learning (cf. 3.6). My argument is, therefore, that the teachers at the coal face are best placed to provide insight about what could ultimately result in study material that could bring theory and practice closer together (Engelbrecht, Oswald and Forlin, 2006; Jerlinder, Danermark & Gill, 2010; Nel, Müller, Hugo, Helldin, Bäckmann, Dwyer & Skarlind, 2011). This would require a partnership between the students (teachers) and me, and a dedicated involvement of both parties to incorporate experience and insight into the adaptation of the learning support study material, which the study aspires to achieve.

Cranton (1996) however, warns that different academic backgrounds (in this case my academic background vis-à-vis that of the teacher) could be a challenge in such a professional relationship. Thus, critical examination of own current practices, as well as critical self-reflection throughout the partnership from both parties (cf. 3.5.4) is essential to ensure an objective involvement in the research process (Mezirow & Associates, 2000; King, 2005; Kitchenham, 2008). Mezirow et al., (2009) affirm that working together through mutually inferred challenges and findings will lead to transformative learning that could ultimately result in a well-developed and relevant ACE learning support teacher education programme. Such a programme could develop appropriate and relevant competences for in-service teachers to implement inclusive education, as well as support learners who experience barriers to learning more effectively. [Please note that although the research focused on the ACE Learner Support programme, which is phasing out, it will be replaced with the Advanced Diploma in Education (ADE) on National Qualification Framework (NQF), level 7 and articulate to either the Post Graduate Diploma (PGDip), NQF level 8, or BEdHons, NQF level 8, with specialisation in learner support
programmes. The research could thus inform the development of study material for these programmes.

Action research through a Participatory Action Learning and Action Research (PALAR) approach has been chosen for this research since the purpose of action research is for participants to critically reflect on known knowledge and existing practice, and then to transform and consequently improve practices where appropriate (Strydom, 2011; Zuber-Skerritt, 2011). In South Africa there are only a few published studies that have employed this kind of research in education. Consequently, besides being the most appropriate method to gather rich data for the purpose of my study, I also envisioned to contribute to the scholarship of research or, as conceptualised by Boyer (in La Lopa, 2013) the scholarship of discovery.

1.3 PROBLEM STATEMENT

Based on the above argument, it is evident that in order for inclusive education to be effectively implemented by FP in-service teachers who choose to formally improve their knowledge and skills with further studies, teacher education programmes need to be revised. The reason is that theory still seems to be the dominant focus of the study material, resulting in students not being adequately prepared to apply the theory into practice. This also implies that teachers’ competences to deal with diversity and transformation, as required by policy (SA, 2001; DBE, 2011) are not sufficiently developed. It seems that teachers’ own experiences and insight with regard to the practice of inclusive education in their classrooms are not always accommodated in the training programme.

1.4 PURPOSE OF THE STUDY

The purpose is to explore how Participatory Action Learning and Action Research (PALAR) can transform the study material of a distance ACE programme in Learner Support. The objective of this will be to develop and improve the skills of Foundation Phase teachers to practice what they have learned in the ACE in Learner Support programme in their classrooms as well as to foster a scholarship of teaching and learning in order to ascertain an attitude of lifelong learning.

1.4.1 Research questions

Based on the purpose of the study, the following primary research question was formulated:

How can a Participatory Action Learning and Action Research (PALAR) approach assist Foundation Phase (FP) teachers to implement inclusive education in the classroom?
The secondary questions were:

- What is inclusive education?
- What does learning support in inclusive education entail?
- What are the challenges that Foundation Phase teachers experience with regard to their understanding of the theory of inclusive education and learning support?
- What are the challenges that Foundation Phase teachers experience relating to the practical implementation of inclusive education?
- What are the needs of Foundation Phase teachers with regard to the training of inclusive education and learning support?
- What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?

1.5 CONCEPT CLARIFICATION

1.5.1 Inclusive education

Booth, Ainscow, Black-Hawkins, Vaughan and Shaw (2000) state that inclusion is often related only to learners with impairments. However, inclusion is about the education of all children as a process of increasing participation of learners in and reducing their exclusion from the curricula, cultures and communities of neighborhood mainstream centers of learning. This process includes a thorough examination of how barriers to learning and participation can be reduced for any child Booth (1999).

1.5.2 Participatory Action Learning and Action Research (PALAR)

Zuber-Skerritt (2011, p. 2) explains that participatory action learning and action research (PALAR) is a “synthesis of concepts of action learning (AL) plus action research (AR) plus participatory action research (PAR) that emerge in the paradigm of PALAR in theory and practice (praxis)".

1.5.3 Action learning set

An action learning set is a small group of people who meet regularly to openly discuss, share, reflect and challenge ways of thinking to solve a problem/s. Although the group may not have a solution for the problem at the beginning of the process, they obtain the key to a solution through collaboration (Thomas & Etheridge, 2004).
1.5.4 Teacher

De Villiers, Wethmar and Van der Bank (2000, p. 30) indicate that “…a teacher is someone who possesses authority in the educative situation by virtue of his/her academic knowledge about education in general and his/her skills and competencies in imparting their knowledge to the learners”. In this study the focus will be on the Foundation Phase teacher who teaches Grades 1, 2 and 3, and thus lays the groundwork for formal schooling. I also refer to myself as a teacher in this research.

1.5.5 Scholarship of teaching and learning

Scholarship of teaching and learning is to “encompass a broad set of practices that engage teachers in looking closely and critically at student learning in order to improve their own courses and programs” (Hutchings, Huber, & Ciccone, 2011, p. xix).

1.6 RESEARCH METHODOLOGY

1.6.1 Paradigms informing the study

A research paradigm is “a way of looking at the world” (Creswell & Plano Clark, 2007, p. 21). It is a strategy that explains the epistemology, theory and the methodological paradigm, and methods used in research (Birks & Mills, 2011). In this research project, I position Participatory Action Learning and Action Research (PALAR) as a paradigm in social science, and not merely as a methodology. PALAR represents an extensive network of approaches to inquiry, on different research traditions that are all participative, grounded in experience and actions. As Zuber-Skerritt (2011, p. 6) says: “It is a way of thinking, feeling, living and being that influences our values, worldviews and paradigms of learning, teaching and research. It influences our behaviour, strategies, methods, and therefore capacity for improving practice.”

- The epistemological paradigm that characterised PALAR is a critical and transformative view of knowledge creation. In this research, knowledge creation occurred when the eight teachers and I in the action learning set, called participants, were empowered to reflect and transform our meaning schemes (cf. 3.5) in terms of our beliefs, attitudes, opinions and emotional reactions (Stringer, 2007; Mertens, 2010; Mertens & Wilson, 2012). The participants reflected on current social reality which, in this case, is the effective application of inclusive education in the classroom, identifying factors that need to change and provide both clear norms for criticism and achievable practical goals for social transformation (Bohman, 2012). My role (cf. 4.6.4) was firstly to develop a partnership with the teachers in the action learning set (cf. 1.7.2) before we could explore ways to assist in-service teachers to close the gap between theory and practice. Through collaboration, we became aware of
the current problems in the inclusive classroom, and together we decided on actions to modify the study material of the ACE Learner Support material. We critiqued ourselves to consider alternative viewpoints and creative ideas that potentiate a deeper understanding of the application of inclusive education in the classroom. We created and shared knowledge, challenges, values, fears, and sought conflicting arguments rather than handed out ready-made truths that assumed solutions for our problems in the inclusive classroom. For this reason, the enquiries were conducted with the participants rather than about them, and resulted in developing scholarship of teaching and learning (Hutchings, Huber, & Ciccone, 2011, p. xix). In the process, the epistemology reflected the basic rationale and methods of inclusive education as a reality, constructed in the classrooms of the participants working in an under-resourced and socio-economically disadvantaged context. The skills, knowledge and experience of the participants in the classroom needed to be seen as assets in the process of marrying theory to the practical programme of professional development (Ebersöhn & Eloff, 2010). The assets were influenced by different factors such as knowledge of the process, understanding the value of assets and experiences that were acquired to apply knowledge and attitude towards the process (Ebersöhn & Eloff, 2010). It is, therefore, important that the participants were regarded as capable individuals to generate their own theories of practice based on their actual years of experience (cf. 4.6.1) and not as passive followers with own intrinsic capacity of individual judgment and perceptions (Garrick, 1999).

- The ontological paradigm in this research related to the social view of the participants regarding inclusive education in the classroom. Our views were supportive where real life collaboration took place within transformational notions of knowledge creation. It happened because of the link we encouraged between theory and practice, the collaboration between us all, the improvement and change of teaching and learning, and the action taken by applying knowledge that permitted practical action to be taken in a distinctively moral sense (Terre Blanche, Durrheim & Painter 2006; Bohman, 2012). To apply ontology in this research, the needs of the participants in the inclusive classroom were developed and shaped by moral, social, political, cultural and economic values indigenous to our social settings. In shaping our reality, the application of dialogical, dialectic and hermeneutic approaches was relevant to this research (Schurink, 1998; Kemmis & McTaggart, 2000; Strydom; 2005). The nature of inquiry in transformative theory required an open dialogue between the participants to reflect on the assets and the barriers that are encountered in the action learning process regarding the practical application of such knowledge in the inclusive classroom. As participants we needed to take equal responsibility for the outcome of the research (Guba & Lincoln, 1994; Cresswell, 2005; Maree, 2010) and all participants were seen as equally important. The application of the above approaches to the research
implied a democratic, empowering and humanising approach (Stringer, 2007). In this manner, the ontological stance linked well with the theoretical stance of the research.

Figure 1.1 is an illustration of equality of participants in the action learning set.

Figure 1.1: Relationship between academic researcher and participants as co-researchers taken from Zuber-Skerritt (2011) adapted for this study.

1.6.2 Theoretical framework

A theory is of little value unless one’s understanding of it influences what one does and how one does it. Then only can one develop practical applications, which come from one’s own understanding, that are relevant to the specific social context in which one finds oneself, (Argyris & Schön, 1974; Terre Blanche et al., 2006). Zuber-Skerritt (2011, p. 81) refers to this as the “lens through which you appreciate the world because that determines your personal values and worldviews, or “Weltanschauungen.” There can thus be no “one size fits all” programme for professional development (Guskey, 2003; Donald et al., 2010, p.13). The theoretical orientation of this study is action learning (AL) which means that learning is cradled in the task itself, taking place in the here-and-now, in a small group known as an action learning set (Revans, 1982; 1998; Mertens, 2010; Zuber-Skerritt, 2011). The focus of this research was to engage with FP
teachers, as participants, through an action learning process (cf. Figure 1.1) that aimed to improve our understanding and practice of teaching and learning in the inclusive classroom as well as develop into scholars of teaching and learning (Hutchings, Huber, & Ciccone, 2011, p. xix). This required drawing from adult learning theory (Knowles, 1984; Knowles, Holton & Swanson, 2012) by using a synthesis of action learning theories of change that has been proposed in the area of transformative adult learning (Mezirow, 1991a; 2000). Mezirow describes transformative adult learning as learning that occurs when an adult engages in activities and, in the process, encounters a different worldview from his/her own (1991a; 2000; cf. 3.5).

The adult then integrates the new worldview into his/her existing worldview to expand the focus. I wanted us, as participants, to construct our own understandings of inclusive education through critical reflection of our current situation in the inclusive classroom along with critical reflection of the current ACE Learner Support study material. These critical reflections served as a compass that guided us through the research project and determined our actions, emotions and performance in the intrinsic transformative process (Mezirow, 1991; Calleja, 2014).

During the process of AL, I was guided by the original theories of Revans, the “father of action learning” (1998). I applied his formula of $L = P + Q + R$; i.e., $L$earning = $P$hysical knowledge (i.e. knowledge in current use, in books, in one’s mind, in an organisation’s memory, lectures, case studies, etc.) + $Q$uestioning (fresh insights into what is not yet known) + $R$eflection (recalling, thinking about, pulling apart, making sense, trying to understand) (Marquardt, 1999, p. 29; Zuber-Skerritt, 2011, p. 24). I wanted the participants to critically evaluate the current learner support study material by relating and reflecting on it, parallel to the day-to-day problems they experienced in the inclusive classroom. Revans (1998) emphasised that action-learning focuses on the application of knowledge, which happens by asking the right questions at the right time, which leads to effective action (cf. 3.5.3). The action took place through a participatory action learning and action research (PALAR) design that will follow.

1.6.3 Participatory Action Learning and Action Research (PALAR) Design

Zuber-Skerritt (2011, p. 6) explains participatory action learning and action research (PALAR) design as a “constructive, innovative and creative qualitative way to solve problems and to develop professionally” (cf. 4.4.2). In this research, the participants were active interveners by helping one another (cf. Figure 1.1) to make a difference in the inclusive classroom of the wider body of in-service teachers through critical self-reflection and dialogue by asking questions about What we are doing?, Why are we doing it? and How can we do it better? (cf. 3.5).
PALAR is thus a process that alternates between action and critical reflection, and provides a means for professionals to critically reflect on their practice (Denscombe, 2003; Zuber-Skerritt, 2011). The participants in the action learning set (Zuber-Skerritt, 2011) met regularly (cf. Table 4.2) to discuss the progress regarding our ability to improve inclusive education in everyday practice of the wider body of in-service teachers. We critically reflected on what needed to change/improve, not only in the classroom and the study material, but also in our attitudes and visions about inclusive education. In this both iterative and cyclical manner, we tested our emerging theories, made adjustments, applied new approaches and refined how we address inclusive education in our respective practices. We aimed to improve our teaching (Zuber-Skerritt & Teare, 2013) and create theory by examining our collective transformation as a result of the process in which we participated (Carr & Kemmis, 1986; Kemmis & McTaggart, 2005).

The research process unfolded in two phases and four cycles (see Fig. 1.2) based on Zuber-Skerritt's (2011) figure eight model.

**1.7.3.2 PALAR model for strategic planning**

The model consists of three main components: vision, context and practice, which are formed by two iterative cycles. Therefore, the components could continuously be revisited, revised, reconsidered, and reflected on. Through PALAR the action learning set focused on teambuilding in the context cycle. The focus was on our assets (Ebersöhn & Eloff, 2010) of which we may or may not always be aware. This helped the participants to form a vision, before moving to the practice part, which is the lower cycle of the figure eight model (cf. Figure 1.2)

![Figure 1.2: Zuber Skerritt's (2011) figure eight model for strategic planning in a PALAR design, adapted for this research.](image-url)
(a) Phase 1:
The purpose of phase 1 of this research was to gain baseline data from 50 Foundation Phase teachers enrolled as students in the ACE bursary programme with two Learner Support modules. The Learner Support modules focused on disabilities and learning difficulties, and a policy perspective on inclusive education. This data helped us (as participants) to identify shortfalls in the study material that needed attention to help prepare the wider body of in-service teachers to practice inclusive education in the classroom and support learners who experience barriers to learning.

(b) Phase 2:
Phase two in this research took place with eight participants in the action learning set. The aim was to critique and positively reflect on the ACE in Learner Support programmes study material to adapt it by narrowing the gap between theory and practice, as well as to develop a scholarship of teaching and learning for lifelong learning (Hutchings, Huber & Ciccone, 2011, p. xix) amongst the wider body of in-service teachers enrolled in learner support programmes. It is important to make the reader aware that the ACE Learner Support study material served as the basis in this research, but the findings could affect all learner support study material that I am responsible for. Marquardt (1999) advises that an action learning set of four to eight members is preferable. I worked with eight participants, because the school where the research took place has eight FP teachers. The eight participants allowed for close interaction and a wide view for reflection.

The first action was to create and build a relationship with the teachers. This is very important for participation, trust and reflection in action research. Zuber-Skerritt (2011) stresses the importance of first considering the contextual (cf. Figure 1.2) factors and human relationships before identifying aims and objectives for the action learning set. She goes so far as to call it a “key reason for failure” (2011, p. 44) for some PALAR programmes. The contextual factors entailed aspects like who are the teachers, what are their assets, are they positive to be part of the research, and do they want to transform their teaching. The asset analysis formed part of teambuilding to help the members to identify strong points in themselves and in their teaching that could support the success of the research. It helped us to maximise and strengthen opportunities and to minimise the focus on weaknesses and barriers.

I used Merriam and Caffarella’s (1999) theory about change during the relationship-building exercise (cf. 1.7.1). It served as guidelines on which change was based and how we as participants see ourselves in the world we live in. The approach followed five orientations, which will only be mentioned here. The reason for this was that, although relationship building was part of the process and important to generate data, it did not form part of data generation;
therefore, it was not analysed under a research question. The five orientations entail the following:

i) To become cognitively aware of a common problem within a particular context that triggers the initial process of learning.

ii) The context in which we learn, determines learning and the moment we change our behaviour, we start to learn.

iii) During the learning process, participants become aware of their own (human) values, develop self-awareness that helps to reflect on teaching, and then directs learning.

iv) Social learning takes place when collaboration and coherence develop between the participants.

v) Constructing knowledge cannot be done in isolation.

The five orientations formed part of the development of the vision (cf. Figure 1.2) of the participants in the action learning set. Together we described the ideal situation that we were trying to create, and achieved this by visualising our aim, which should not be constrained by presenting realities or limitations to our vision.

The lower part of the figure eight model (cf. Figure 1.2) deals with planning for improved practice. This was the task of the action learning set. It is important to emphasise that the figure eight model can be repeated as many times as possible until the participants can answer the research question. The question or the action plan that drove this cycle of practice was “How can a Participatory Action Learning and Action Research (PALAR) approach assist foundation phase (FP) teachers to implement inclusive education in the classroom?” The goals and objectives focused on the participants’ understanding of the two Learner Support modules in the ACE programme that concentrated on disabilities and learning difficulties, and a policy perspective on inclusive education. Through the purposeful discussions in the action learning set (cf. 4.8.2), the participants gained a deep understanding of the challenges they were facing in terms of knowledge, skills and context. This helped us to generate ideas to improve and reach shared visions on how to improve the study material for the wider body of in-service teachers enrolled in an ACE or similar programme and also added to the development of our own scholarship of teaching and learning (Hutchings, Huber, & Ciccone, 2011, p. xix).

The cycles blended into each other and, after the context analysis, we again revised the vision (cf. Figure 1.2). The reason for this decision was that, during the first vision formulation and the context analysis, the vision might have changed. The participants had the opportunity to
become more aware of real-life issues that teachers in general experience. Zuber-Skerritt (2011) stresses the importance of the mentioned three stages of vision, context and practice, before a start is made to improve the practice.

(c) Cycles of inquiry
During the four cycles of inquiry, the participants worked towards success. Problems encountered in phase 1 were analysed with the aim to improve the teaching and learning in the inclusive classroom. To achieve this, the action learning set needed to “own” the problem (Zuber-Skerritt 2011, p. 44) and “agree on the aims, objectives, desired outcomes, and the action plan.” To accomplish this, regular meetings were held with the purpose of connecting theory and practice (praxis) and developing a grounded theory to create guidelines for improving the practice of inclusive education. The data generated amongst the participants were systematically analysed and feedback was collaboratively given to interpret the results. The participants repeatedly revisited the vision and did context analysis to verify if the planned strategies, evaluations and actions for improving teaching and learning strategies of the learning material would emerge. Zuber-Skerritt refers to the repeating as development from the “inside out” (2011, p. 6).

During the cycles of inquiry, Zuber-Skerritt (2005a) underlines the importance of keeping in mind one’s core values, collaboration, reflection, appreciation of diversity, one’s paradigm, as well as the question one wants to answer.

1.6.4 Research method
This research used a qualitative approach to generate data because it was an inquiry process for understanding a problem happening within the environment of the problem, relying on spoken words, and lived experiences (Creswell, 2005; Nieuwenhuis, 2010; Fouché, Delport & de Vos, 2011). The research environment was the inclusive classrooms where the participants were teaching. A qualitative research design is flexible and unique, and evolves throughout the research process (Nieuwenhuis, 2010; Fouché, Delport & de Vos, 2011). This is why PALAR as a research design, happening in cycles, was applicable. In each cycle, the participants reflected on practice, took action, reflected again, and took further action on their current situations and actions (Zuber-Skerritt, 2011). This made the research flexible so that each turn of the cycle could build on the understanding and experiences of the previous cycle. This means that data were generated, analysed and interpreted simultaneously, moving back and forth in the research cycles (cf. Figure 1.1). No fixed steps were followed, which could make the research design difficult to be exactly replicated (Patton, 2002). However, future research on the PALAR method could use the steps followed in this research as guidelines.
1.6.5 Participant sampling

In this research, the participants in phase 1 were purposively selected. It included all 50 FP teachers enrolled in the ACE programme in Learner Support.

Phase two of this research continued in the Free State Province (cf. 5.4) where I purposefully (Leedy & Ormrod, 2010; Maree, 2011) selected eight FP teachers from one school to form an action learning set. The reason for this was that it was the most teachers at one school enrolled in the ACE programme, making it a convenient sample. The school is within travelling distance from my home, which was an advantage, since the research entailed many visits to the school. Further details of the sample will be provided in Chapter 4.

1.6.6 Data generation

Data generated in phase 1 of the research project was not done according to the PALAR approach. Phase 1 was explorative (Boeije, 2010) to understand the problems regarding inclusive education that teachers face on a daily basis in their context. I used open-ended questionnaires to generate baseline data (Mac Naughton & Hughes, 2009; Leedy & Ormrod, 2010) from the 50 teachers. The questions asked focused on determining what teachers know and understand about the theory and practice of inclusive education, as well as of learner support. The questionnaires helped the participants in phase 2 in the action learning set to shape our thoughts while analysing the study material, and enabled us to reflect on our learning as well as on our classroom practice.

In Phase 2 the participants in the action learning set as per PALAR were used to generate data via four different methods in the four cycles (cf. Figure 1.2):

- The first method was **purposeful discussions** between the participants. This occurred throughout the research process in the action learning set meetings (Leedy & Ormrod, 2010). During these discussions, the participants shared classroom and teaching experiences and established rapport amongst one another through self-reflection. To establish rapport between participants in PALAR is important for building relationships. In this manner I, who was outside the school environment, had the opportunity to see the world through the eyes of the participants. It provided rich data and valuable information on the problems they experience in the classroom related to inclusive education.

- Method two was by using **reflective diaries**, a valid source of subjective data from the participants. The reflective diaries captured thoughts, feelings and observations of the participants, which was important in this research where the purpose was to make changes in practice. The more the participants reflected on their own practice, feelings, reactions
thoughts and behaviour in their classrooms— and not only on obstacles to implement inclusive education—the more the diaries served its purpose of professional, as well as scholarly, development (Alaszewski, 2006; Biggs & Tang, 2007; Zuber-Skerritt, 2011).

- The third method was my classroom observations of the participants. The observations gave me an opportunity to get an inside look into their daily activities (Strydom, 2011) in the classroom. I could, therefore, relate to their problems and frustrations they mentioned during the purposeful discussions. The fourth method was open-ended reflective learning questionnaires (r-learning) in which the participants reflected on their learning journey during the research project. Through r-learning, as participants, we focused positively on what we currently have and the way forward to encourage the development of scholarship of teaching and learning (Hutchings, Huber, & Ciccone, 2011, p. xix) in the study material of the ACE programme (Ghaye, Melander-Wikman, Kisare, Chambers, Bergmark, Kostenius, & Lillyman, 2008).

1.6.7 Data analysis

The data analysis of this research was influenced by the critical transformative paradigm (or lens) derived from my epistemological and ontological stance towards reality in the inclusive classroom (Cresswell, 2005; Biggs & Tang, 2007; Leedy & Ormrod, 2010). The research question “How can a PALAR approach assist FP teachers to implement inclusive education in the classroom?” guided the lens through which I looked at the data.

The analysis of the purposeful discussions, observations, reflective diaries and r-learning questionnaires is displayed in table format in chapters 5 and 6. Lacey and Smith (2010) point out that data in action research can be a considerable amount and thus be overwhelming. In PALAR, as Zuber-Skerritt (2011) indicates the analysis of data is a continuous process because the cyclical process of collecting and analysing data is inter-linked and reflection is integrated into every session of data collection. Once the data were collected, the grounded theory analysis was applied in the following stages:

- Coding proceeded from open- to selective coding to integrating it with theoretical concepts.

- The concepts developed through constant comparison with other slices of data, which were informative conversations, observations, reflective diaries and r-learning questionnaires.

- The emerging themes and their connections were integrated with existing theoretical literature to find how these all fit together in categories (Saldana, 2013; Flick, 2014). Chapters 4 and 5 will supply more detail.
1.6.8 Measures to ensure trustworthiness

In order to ensure trustworthiness and credibility in the research, measures were followed, as stipulated by Leedy and Ormrod (2010) to establish trustworthiness of the findings in this qualitative research. The action learning set met seven times during a period of sixteen months to reflect on the research phenomenon. The data were described in detail with the aim to draw conclusions and to answer the primary research question. The analysis of the research was discussed with the participants to verify if they agreed with the findings and whether I had correctly interpreted their true reflections and drew valid conclusions from the data.

Herr and Anderson (2005) feel strong about quality in action research and suggest five quality indicators that have been used in this research:

- Outcome validity includes the level to which actions resolve the initial problem posed: Did we succeed in identifying the obstacles in the inclusive classroom? (cf. 5.8.2);

- Process validity includes the level to which problems are framed and solved in a way that enables ongoing learning: Could we get to a point of how to address the obstacle and overcome it? (cf. 5.10);

- Democratic validity includes the level to which research is done in collaboration with all the participants: Did we all work equally together to solve problems and overcome the obstacles? (cf. Figure 1.2);

- Catalytic validity includes the level to which the research process reorients, focuses, and energizes participants towards knowing reality in order to transform it: Are the teachers equipped to take control of their teaching and apply the theory of inclusive education in their classrooms? (cf. 5.8.2); and

- Dialogic validity reflects on the developing of the research processes in which I can have confidence in my findings: Can I go back to my teaching and learning and apply the knowledge and adapt my study material? (cf. Chapter 6).

1.7 ETHICAL CONSIDERATIONS

Ethical guidelines are needed to guard against possible harmful effects of research (Mertens, 2010). I abided by the ethical guidelines of the Ethics Committee of the North-West University, which included informed consent, transparency and privacy of the participants. It was made clear in both written and oral consensus that no participant was forced to take part in the action learning set (cf. Appendix A). The participants were allowed to withdraw at any stage, and every
participant’s information was treated confidentially. In analysing the reflective diaries, confidentiality of the participants was strongly protected. They only gave me access to the parts in their diaries applicable to the research. Findings of the research were reported in a complete and honest fashion without misleading others about the nature of the findings. Data were not fabricated to support a particular conclusion. The school where the research was conducted in phase 2, was contacted beforehand to obtain permission from the principal. The Free State provincial Department of Education was also contacted to obtain permission for the research to be undertaken in phase 2.

1.8 PRELIMINARY STRUCTURE

**Chapter 1** comprises the problem under investigation and the context in which the problem exists.

**Chapter 2** presents the conceptual framework and related literature on inclusive education in South Africa.

**Chapter 3** reviews the concept of the development of scholarship in teaching and learning through PALAR.

**Chapter 4** provides the theoretical justification and explanation of the research design, and introduces, describes and explains the methods of the research focusing on the two phases and four cycles of the action research.

**Chapter 5** discusses the results of the two phases and four cycles of the action research.

**Chapter 6** presents the findings, conclusion and implications of the research.
CHAPTER 2: A DISCUSSION ON INCLUSIVE EDUCATION IN THE SOUTH AFRICAN CONTEXT

Inclusive education is the central approach to education in South Africa and is the focus of the learning programme that is being explored in this participatory action learning study. It is, therefore, important to position this research project within the context of inclusive education. In this chapter, inclusion will be conceptualised followed by a detailed discussion of inclusive education with its challenges and the role of the teacher in the South African education context.

2.1 CONCEPTUALISING INCLUSIVE EDUCATION

Before the concept is discussed, it is important to provide a brief background about how inclusive education became a fundamental approach to education globally. A strong movement towards education for all (EFA) was initiated at a conference in Jomtien in 1990. The movement especially focused on learners experiencing barriers to learning and those learners who are excluded from mainstream education (UNESCO, 1994). An inclusive approach within the EFA movement was thus fundamental and accepted as the best option to overcome discrimination in education. In 1994 at Salamanca in Spain, 92 countries agreed that inclusive education should be the focal approach to education (UNESCO, 1994). In the Salamanca Statement (1994) it is noted that those with “special educational needs must have access to regular schools which should accommodate them with child centred pedagogy capable of meeting these needs” (UNESCO, 1994, p. viii). Inclusive education is also considered central to human rights, equal opportunities, and a priority policy objective of liberal democracies (Winter & O’Rawl, 2010). Consequently, throughout the world today, the right for every child to receive education in a formal schooling system is recognised as an established key policy objective (Lindsay, 2007).

The United Nations Convention on the Rights of Persons with Disabilities (UNCRPD, 2006) was also ratified by South Africa in 2007 and is an international human rights treaty of the United Nations to protect, promote, and ensure human rights, equality and dignity of persons with disabilities under the law (Swart & Pettipher, 2011a).

Although inclusion is regarded as an important policy shift in education (Jull, 2009, p. 492), it remains a controversial issue in educational discussions (Mitchell, 2008; Bornman & Rose, 2010). The reason for this could be that the term inclusion has different meanings in different contexts in different countries (Ainscow, Conteh, Dyson & Gallanaugh, 2007) and is consequently interpreted differently by different people. Corbett (2001, p. 10) controversially declares that the term inclusive education has become so “used and abused, that it has little meaning.” Many teachers, parents and education officials still seem to be confused about what inclusive education entails. Many authors, such as Swart & Pettipher (2011), Raynor (2007), as
well as Thomas and Vaughan (2004), maintain that inclusion became a “buzzword” rather than a guiding principle in education development. Therefore, to offer a general definition of concepts like inclusive education, inclusive teaching and inclusive classroom, which are context-bound, is a difficult process (Swart & Pettipher, 2011a) since different views influence the implementation of inclusive education (Nel, Müller, Hugo, Helldin, Bäckmann, Dwyer & Skarlind, 2011). The Salamanca Statement, as the foundation of international discussions on inclusive education, is criticised for being vague towards the application and implementation of inclusive education. The broader notion of EFA asserts that the Salamanca Statement has internationally more or less collapsed because it was “strong on nouns like empowerment, inclusion and quality education, and weak on who has the obligation to do what” (Tomasevski, 2004, p. 5). Some researchers affirm that the implementation of an inclusive education policy is oppressed with tension, contradictions and complexities (Moss, 2003; Graham & Slee, 2005; Slee, 2006; Spurgeon, 2007; Wildeman & Nomdo, 2007; Miles & Singal, 2010; Hornby, 2012). Others refer to inclusion as “impractical” and “ideological” (Thomas & Loxley, 2007, p.134), or as a “monument to political correctness and a messy confusion of contradictory or idealistic thinking and discourse” (Raynor, 2007, p. 36), rather than being embedded in the reality of context-bound educational practice (Pather, 2008; Miles & Singal, 2010).

However, although there are strong differences of opinion with regard to inclusive education, there is a general agreement that central issues such as social justice, equitable education systems, and the responsiveness of schools towards diversity must be addressed in education (Lalvani, 2013) and a policy of inclusive education is, therefore, required.

For the purpose of this study, the following typologies of Ainscow and Miles (2008) provide a generally accepted conceptualisation of inclusive education:

i) Inclusion, as concerned with disability and “special educational needs,” refers to the assumption that inclusion is about learners with disabilities or special educational needs that need to be educated in mainstream. Mainstreaming embodies a normalisation principle that refers to learners with disabilities who have a right to the same or similar life experience as anyone else in society. The danger is that the learner needs to “fit into” the existing classroom structure, as opposed to inclusion which is about recognising and respecting the differences and building on similarities (SA, 2001).
ii) Inclusion as a response to disciplinary exclusion and the bad behaviour of a learner. However, this can frighten teachers when being asked to include learners whose behaviour is considered “difficult” or who have been excluded from other schools as a result of severe behaviour problems (Buyse, Verschueren, Doumen, Van Damme & Maes, 2008).

iii) Inclusion is about all groups vulnerable to exclusion on grounds of social exclusion. This category can include the following: a learner falling pregnant; a child in care of public authorities; learners being excluded because of a disability or disciplinary problems; learners living in poor economic circumstances, and/or child-headed households; children from immigrant parents; and orphaned children as a result of parents dying of HIV/AIDS parents or other illnesses (Nel, 2013).

iv) Inclusion as the promotion of a school for all refers to a generic school that serves in all the needs of diverse learners. The idea was founded in 1990 as a result from the World Conference on Education for All (EFA) held in Jomtien, Thailand, referred to earlier. EFA focuses on the vulnerable and marginalised learners and a key goal of this movement is to ensure that all children have a primary education of at least five years by 2015. However, Miles and Singal (2010) indicate that some of the poorest children and those with disabilities have not yet benefited from this movement.

It is obvious from the above that although there are different definitions and various opinions on how education should be inclusive, the global belief is that inclusivity rather than exclusivity should be practiced. These global developments also had a fundamental impact on education in South Africa (Bornman & Rose, 2010; Swart & Pettipher, 2011a; Nel, 2013).

2.2 INCLUSIVE EDUCATION IN SOUTH AFRICA

2.2.1 Theoretical grounding of inclusive education in South Africa

Since the political transformation of South Africa after 1994, the principles of human rights and equality informed all educational policy developments (Engelbrecht et al., 2013). Before 1994, the South African school system was based on a racial and special needs education approach. This system did not provide for a large portion of learners and, specifically, those experiencing barriers to learning. In many cases, these learners experienced discrimination along racial, policy and legislation lines, since they were either included into the mainstream by default or separated from learners without barriers in mainstream schools. These children were then categorised and labelled as having special needs and requiring a special class or school for their education. This argument is in line with the medical deficit model, or “deficit-within-child” model (Swart & Pettipher, 2011a). The term speaks for itself by relating the problems to the learner’s perceived inadequacies rather than by looking at how the pedagogic practice as well
as the social context affects the learning process. Although the medical model has its place in
the schooling system, it is not a helpful model in social science where barriers to learning are
not always located in the child but are situated in the community (Areheart, 2008).

A discussion will follow on the differences between the medical- and socio-ecological models
since these are the main models that influence policy, as well as implementation practices with
regard to inclusive education.

2.2.1.1 The medical model

Areheart (2008) describes the medical model as using a functional paradigm where an expert
professional focuses on the diagnosis and prognosis to cure or correct the “illness,” which
results from a physical, physiological, neurological, cognitive or perceptual problem. These
experts, in many instances, regard the intrinsic factors of the learner as more important to
receive attention, and generally disregard the needs of the parents as well as contextual and
environmental factors that could impact on the learner’s progress. This kind of diagnosis
obstructs opportunities for a holistic approach to intervention and mostly evolves in labelling and
discrimination based on disability. It further views the disability as a characteristic or an attribute
of the learner (ETTAD, 2007; Areheart, 2008; Swart & Pettipher, 2011a). The medical model
was formed by the WHO’s debate on the connotations of disability terminologies such as
handicap, impairment and disability. Due to the influence of the model, “decisions about
education and placement of children with disabilities have resulted in a marginalised population
that has been institutionalised, segregated, under-educated, socially rejected, and physically
excluded from employment” (Carrington, 1999, p. 257). A large population of teachers in South
Africa was trained before 1994 when the medical model was still applied for learners who were
identified with ‘special needs’. At that stage, teachers were trained either as general teachers or
as special education teachers. As a result, a large percentage of mainstream teachers did not
obtain the necessary knowledge and skills to teach learners with disabilities, which is essential
in a diverse and inclusive South African culture (Armstrong 2009; Magare, Kitching & Roos,
2010).

After the movement to inclusive education a paradigm shift was needed to change the focus
from the medical model to the normalisation principle. Normalisation can be related to the terms
mainstreaming and integration, and refers to the idea that all learners with disabilities can enjoy
normal everyday life in a normal mainstream school. The critique against the models of
mainstreaming and integration was that they still focused on the learner who is experiencing
barriers, to fit into the mainstream setting (Frederickson & Cline, 2002). With an inclusive
education approach, the normalisation principle is linked to the socio-ecological model.
2.2.1.2 The socio-ecological model

The socio-ecological model is rooted in the human rights paradigm that stresses equal opportunities, self-reliance, and independence for all (Engelbrecht, Green, Naicker & Engelbrecht, 1999; Swart & Pettipher, 2011b; Donohue & Bornman, 2014). Two perspectives informed this model: the social and ecosystemic perspectives. The social model developed three decades ago when organisations with empathy for people with disabilities started to view disability as a human rights issue (Crous, 2004). This model proclaims that society is in general unaccommodating or inflexible towards people with disabilities and therefore asserted that within a society people with disabilities need to be accommodated. Consequently, society needs to change and not the person with the disability in society (DoE, 1997). In 1917 Mary Richmond (as cited in Capra, 1997) referred to the concept person-in-environment and the imbalance between the two and stressed that rethinking is needed about the person in the environment. This view has given rise to the ecosystemic perspective, which attempts to understand the person within his/her context.

The ecosystemic perspective views a person as interconnected with his/her multi-layered social context. No person can be understood apart from his/her social context in which they are embedded. A social context or society consists of a wide range of diversities that include people, levels in society, socio-economic conditions, ways of life, cultures, religious beliefs, practices and values all “linked in dynamic, interdependent, interacting relationships” (Donald et al., 2010, p. 35). A range of authors assert that the social context guides one to see, to connect, to eliminate and to form habits of thoughts of reality (Laszlo, 1972; Plas, 1986; Schunk, 2004; Yoon & Kuchinkie, 2005; Naong, 2007). In this diverse society, an enormous network of relationships develops which Donald et al., (2010) compares to a web of life. If one element in society or a person's social context is touched by an action in the society, another element is likely to respond because the different elements are systemically connected like a “spider web” of relationships (Donald et al., 2010, p. 38). This interconnected society functions in a reciprocal manner and develops essential properties and assets that become the existence of society. The same interconnectedness of society applies to a school with its many role players, like the DBE, school management, teachers, parents, learners and community members who together function as a social system of the school. The effective functioning of the school depends on these groups of people as an interactive system (Marais & Meier, 2010; Swart & Pettipher, 2011b; Donald et al., 2010; Nel, 2013).

Inclusive education focuses on transforming school cultures and pedagogy in order to enhance understanding and acceptance of learners coming from different social societies and systems (Klibthong, 2012). It is, therefore, essential that the systems in a school society need to interact...
to provide a secure school environment where learning can take place. Bronfenbrenner’s bi-ecological systems theory explains how different levels of systems interact in the process of child development in social context.

### 2.2.1.3 Bronfenbrenner’s bio-ecological systems theory

Bronfenbrenner’s bio-ecological systems theory can be useful in understanding the interaction between the classroom, the school, and family by viewing it as systems in itself and in interaction with the social context parallel with the process of child development. He describes the following four interacting dimensions within these different systems that affect child development (Donald et al., 2010, p. 40; Swart & Pettipher, 2011a, p. 11-13; Nel, 2013, p. 25-26):

- **Person factors** include behavioural dispositions, e.g. impulsiveness, hyperactivity or passivity, distractibility, aggression, feelings of insecurity, shyness, genetic defects, low birth weight, brain damage, etc.

- **Proximal process factors** refer to patterns of interaction within a system. A person as well as social factors can have an effect on it, e.g. an interaction happening in a classroom rippling through to the school and community.

- **Contexts** refer to factors such as families, schools, classrooms and communities.

- **Time** refers to changes happening over time due to progress in the individual as well as changes in the environment, e.g. moving from apartheid to democracy.

Bronfenbrenner further proclaimed that child development happens in four environmental systems, namely micro-, meso-, exo-, and macrosystems, which interact with each other. Since there are changes over time he also refers to the chronosystem. These systems influence a child’s development (Donald et al., 2010, p. 40-41; Swart & Pettipher, 2011a, p. 14-15; Nel, 2013, p. 25-26).

- **Microsystems** are systems, such as a family, the school, a group of friends where children are closely involved in continuous face-to-face interactions, involving patterns of daily activities, roles, and relationships.

- **Mesosystems** comprise a system of microsystems where continuous interactions take place. Therefore, what happens at home or in the circle of friends can influence how a child responds at school and vice versa. The mesosystem is very similar to what we sometimes refer to as the neighbourhood.
• Exosystems are systems in which a child is not directly involved, but people who are involved in the ecosystem may have an influence on the child in his/her Microsystems. For example, what happens to a parent at work may influence the child’s family and ultimately may have an effect on the child’s development.

• Macrosystems involve dominant social structures, as well as beliefs and values that influence or may be influenced by different systems. A cultural value of respect for people in the community may influence interactions in the child’s Microsystems, which would run through the whole mesosystem where the child is involved.

From the above discussion, it is apparent that the systems theory of Bronfenbrenner has a relevant and important role to play in an inclusive education approach. To be able to understand the whole in which a child functions, it is essential to focus on the different parts of the system that influence the child. This implies that when a system such as a group of friends, family or school experience difficulties, the cause or the solution is not situated in one single system, but is interdependent of all the systems involved. Therefore, within the bio-ecological systems theory the following could be regarded as environmental factors that contribute to barriers to learning: the education system, society, the economy, politics, lack of access to basic services, poverty, underdevelopment of children, the HIV and AIDS epidemic, inflexibility of the curriculum, lack of appropriate communication, diverse ethnic and language groups, poor physical facilities, negative attitudes and lack of parental involvement (Swart & Pettipher, 2011a).

The socio-ecological model consequently became the foundation on which South African policies, focusing on the development and implementation of inclusive education, are built.

2.3 POLICY DEVELOPMENTS

The Constitution of the Republic of South Africa, Act No.108 of 1996 (Republic of South Africa, 1996) underpins all-inclusive education policy development (SA, 2001). Section 29 of the Bill of Rights, states “everyone has the right to a basic education, including basic adult education; and to further education, which the state, through reasonable measures, must make progressively available and accessible.” It further affirms that the government may not discriminate directly or indirectly against anyone or any person with a disability. The Constitution of South Africa (Act 108 of 1996) therefore advocates the achievement of equality and the advancement of freedom and human rights. A pivotal strategy in which equality, freedom and human rights can be achieved is establish an education and training system that ensures that all learners, with or without disabilities, are able to pursue their learning potential without restriction (Frankel, Gold & Ajodhia-Andrews, 2010).
The South African Schools Act 84 of 1996 (SASA) was introduced in 1996 and acts as the legislative framework for implementing an inclusive education system. It states in section 5(1) that “A public school must admit learners and serve their educational requirements without unfair discrimination in any way.” Schools in South Africa should, therefore, not discriminate against learners from different political, socio-economic backgrounds, races, ethical groups and languages, as well as disabilities (South African Constitution, section 9 (3), (4) and (5) and section 29(2)). This implies that, in the South African context, learners who have any kind of impairment such as a physical, intellectual, visual, or auditory disability may be allowed into mainstream education.

Policy development with regard to inclusive education specifically started in 1996 with the commissioning of the National Commission on Special Needs in Education and Training (NCSNET) and the National Committee on Education Support Services (NCESS). Their task was to investigate and make recommendations with regard to ‘special needs’ and support services in education and training in South Africa. The purpose of the investigation was to ensure that the education system became more responsive to the diverse needs of all learners. Their report (DoE, 1997) formed the conceptual framework for the National Education White Paper 6 on Special Needs Education, “Building an Inclusive Education and Training System”, as well as several follow-up policy and guideline documents.

2.3.1 NCESNET and NCESS report

All phases of education were targeted in this investigation, including early childhood development, the general education and training phase (GET), further education and training (FET), higher education and adult education. This report also encompassed every aspect of education, namely, its organisation and governance, funding, curriculum, institutional development, as well as utilisation and development of human resources.

After the investigation the following vision of the NCSNET/NCESS report underlined all their findings and recommendations:

The development of an education and training system that promotes education for all and fosters the development of inclusive and support centres of learning that will enable all learners to participate actively in the education process so that they can develop and extend their potential and participate as equal members of society (DoE, 1997, p. 53).

The principles of human rights and social justice for all learners, participation and social integration, equal access to a single inclusive education system, access to the curriculum, equity and redress, community responsiveness and cost effectiveness were regarded as fundamental to ensure the transformation to a fully inclusive education system.
Some of the key issues that the report emphasised, needed to be addressed to meet the needs of all learners and ensure effective learning (DoE, 1997; Muthukrishna & Schoeman, 2000; Lomofsky & Lazarus, 2001; Pottas, 2005):

1. Moving away from an ‘individualistic’ approach to a ‘systemic’ approach, therefore responding effectively to the needs of all learners;

2. Developing an integrated system of education where the ideas of 'special' and 'ordinary' are not utilised. It was highlighted in the report that an integrated system will provide opportunities for the inclusion of the learner in all aspects of life.

3. Infusing support services, which embrace not only support to individual learners, but also to the educators and the system responsible to address diversity;

4. Creating a holistic approach to institutional development that focuses on the development of all aspects of learning in order to facilitate a positive culture of teaching, learning, and services. The holistic approach includes aspects like strategic planning and evaluation, organisational leadership and management, structures and procedures, staff development and other mechanisms.

5. Establishing a flexible curriculum capable of responding to the differences among learners and ensuring that all learners can participate, effectively in the learning process. It also needs to address flexibility with regard to the content, teaching approaches, learning materials and assessment.

6. Promoting the rights and responsibilities of parents as they play a vital role in the education of their children. Parents must be empowered to participate in the school environment and become actively involved in the planning, development, implementation, and monitoring of education and support.

7. Developing a community-based support system to reach a larger number of learners who need support in their learning process. Structured community participation is essential to develop and support education provision.

8. Instituting professional development programmes for educators and other human resources that equip them with the necessary skills (pedagogic practice) and knowledge to promote positive attitudes to respond to the needs of all learners. The programmes, within a team approach, should include pre-and in-service professional development.
Creating centres of learning in such a way as to prevent social and learning problems. The aim should be to reduce environmental risks, promote resilience among learners and communities, and develop a supportive and safe environment for learners.

The NCSNET/NCESS report also dealt with terminology, like special education needs. In the previous dispensation, the term learners with special needs resulted in a general categorisation that included all learners who, in some way or another, could not cope or fit into mainstream education. This term had a negative connection by referring to inadequacies that indicate that the learner with a special need does not fit into the system, which involves the department of education, the school and the classroom. The term therefore fails to describe the nature of the need, and provides no comprehensive insight into the cause of the learning need which affirmed a medical model view. This resulted into labelling and discrimination of learners (Hart, 1996; DoE, 1997; Florian, 2007; Pather, 2011). Consequently, the report stated that within an inclusive education system causes within the system need to be identified. Effective educational support can then be provided by rather changing the system than only focusing on supporting the individual. Thus the term barriers to learning and development was proposed (instead of special needs) in order to also identify possible barriers in the system that may lead to a learning breakdown —and not only within the learner. The challenge, according to Lomofsky and Lazarus (2001, p. 311) is, however, to minimise, remove and prevent the systemic barriers to learning and development in order to assist the education system to become more responsive to the diverse needs of the learner. (Some of these challenges will be discussed later: cf. 2.4.). To distinguish between systemic or external factors that can cause barriers to learning and a disability or an impairment of an organic/medical kind that a learner experiences, the term barriers to learning was divided into extrinsic barriers and intrinsic barriers to learning and development (SA, 2001).

**Extrinsic** systemic barriers can include the following (DoE, 1997; SA, 2001; Lomofsky & Lazarus, 2001; Prinsloo, 2011; Swart & Pettiper, 2011a):

i. Socio-economic barriers can have a negative influence on effective education because it has a direct influence on adequate educational resources essential to meet learning needs. These barriers refer to the following aspects: under-development of children and lack of basic services, like lack of transport hindering learners to reach schools or learning centres; poor living conditions; undernourishment; lack of proper housing; and unemployment.

ii. Threats to the physical and emotional well-being of a learner include sexual and physical abuse, dysfunctional families, community uproar, crime and violence, HIV/AIDS and other chronic diseases and illness.
iii. Negative attitudes, beliefs and prejudice towards differences in race, class, gender, religion, culture and disabilities can have a critical destructive impact on the development of the learner (SA, 2001). The attitude of the teacher in the inclusive classroom is of utmost importance for successful implementation of policy in daily class activities. However, attitudes can be influenced by her experiences, class size, availability of effective support services and resources, workload and professional development (Tembo & Ainscow, 2001; Engelbrecht et al., 2005; Pather, 2006; Greyling, 2009; Pather, 2011).

iv. Since a learner-centred approach is emphasised in an inclusive education approach, a flexible curriculum as well as flexible teaching methods are important to accommodate the diverse needs of learners, their different learning styles, and the pace of learning. Thus, an inflexible curriculum is regarded as a barrier in the inclusive classroom (Vayrynnen, 2003; Loreman, 2007).

v. South Africa has eleven official languages, including sign language. Consequently, communication in many classrooms is a challenge to both learner and teacher, since they are either not learning or teaching in their mother tongue (Makoelle, 2011).

vi. Many school buildings and physical environments, as well as the recreational activities, are not “disabled friendly”, for example narrow doorways, stairs, unreachable light switches, written communication not adapted for the visually impaired learner, and sanitary facilities that are not compliant with the needs of a disabled learner (Engelbrecht & Green, 2007).

vii. The lack of adequate support services. All role players in the school community need to collaborate when providing support to serve the best interest of the learner. These role-players should include teachers, parents, community members, school authorities, training institutions and health professionals. A support team at every school therefore needs to form an inter-sectorial committee with health professionals, police, social services, child protection units and therapists.

viii. Lack of parental recognition and involvement. Parents and the broader community in the teaching and learning process are not always actively involved in the learning development of their children. This can be by own choice or by lack of collaboration from the school’s side. Where parents are not given this recognition or opportunity to be part of effective learning, the process is threatened or hindered which results in ineffectiveness of learning (Nel, Engelbrecht, Nel & Tlale, 2013).
ix. When there is a lack of human resource development, the teacher in the inclusive classroom will not be able to address practical challenges in the classroom. It is thus important that teachers are equipped with pedagogic strategies and knowledge to manage classes with diverse learning needs (Geldenhuys & Wevers, 2013).

**Intrinsic** barriers occur within the child that could cause barriers to learning and development. This includes: learning disabilities; psychosocial disturbances; differences in intellectual ability; traumatic life experiences impacting on the emotional state of a child; socio-economic deprivations resulting in developmental disabilities; as well as physical, mental, sensory (visual and hearing), neurological and developmental impairments. Impairment is a general term for a variety of neurological disorders, which manifest in difficulties with language (e.g. speaking, reading and writing) and/or mathematical calculations (SA, 2001; DBE, 2008; Donald et al., 2010).

The findings of the NCSNET/NCESS that led to the Education White Paper 6: Special Needs Education: *building an inclusive education and training system* (EWP6, 2001) and other important policies will be discussed next.

### 2.3.2 Education White Paper 6 (EWP6)

Education White Paper No. 6 Inclusive Education (SA, 2001) became the roadmap for transforming the education system to become more inclusive and defined inclusive education as follows:

- Acknowledging that all children and youth can learn and that all children and youth need support;

- Accepting and respecting the fact that all children are different in one way or another and that they have different learning needs which are equally valued as part of human experience;

- Enabling education structures, systems and learning methodologies to meet the needs of all learners;

- Acknowledging and respecting differences in learners, whether due to age, gender, ethnicity, language, class, disability, HIV or other infectious diseases;

- Needing broader than formal schooling and acknowledging that learning also occurs in the home and community, and in formal and informal settings and structures;
• Changing attitudes, behaviour, teaching methods, curricula, and environment to meet the needs of all learners;

• Maximising the participation of all learners in the culture and curriculum of the school; uncovering and minimising barriers to learning; and

• Empowering learners by developing their individual strengths and enabling them to participate fully in the learning process.

The following key strategies and levers for establishing an inclusive education and training system were determined:

• Converting special schools into resource centres that provide professional support to neighbourhood schools and are integrated into district-based support teams;

• Changing the process of identifying, assessing and enrolling learners in special schools, and replacing it by also acknowledging the central role played by educators and parents;

• The mobilisation of out-of-school disabled children and youth of school-going age;

• The transformation of primary schools into full-service schools;

• Orientating and introducing school management, governing bodies and professional staff to the inclusion model;

• Early identification of learning needs and intervention in the Foundation Phase;

• The establishment of district-based support teams to provide a co-ordinated professional support service drawing on expertise of further and higher education and local communities;

• The launch of a national advocacy and information programme.

Although EWP6 was introduced in 2001 and envisioned the implementation of inclusive education over 20 years, after nearly 14 years the successes of the above mentioned strategies are questioned by several researchers (For example, Stofile & Green 2007; Wildeman & Nomdo, 2007; Pillay & Terlizzi 2009; Pather, 2011; Nel et al., 2014). This can be attributed to a wide range of challenges that will be discussed in more detail later in this chapter (cf. 2.4).
2.3.3 Other policy and guideline documents

To actuate EWP6 a range of policy and guideline documents have been developed (Swart & Pettipher, 2011a; Nel, 2013):

- the Draft conceptual and operational guidelines for the implementation of inclusive education (DoE, 2002);
- the Conceptual and operational guidelines for special schools as resource centres (DoE, 2005a);
- the Conceptual and operational guidelines for full service schools (DoE, 2005b);
- the Conceptual and operational guidelines for district based support teams (DoE, 2005b);
- Guidelines for inclusive learning programmes (DBE, 2010);
- Guidelines for Full-service / Inclusive Schools (DBE, 2010).

Several curriculum developments from 1997, namely Curriculum 2005 (Department of Education, 1997), then the National Curriculum Statements (NCS) (Department of Basic Education (DBE), 2002) and currently the Curriculum and Assessment Policy Statements (CAPS) (DBE, 2011) that replaced the Revised National Curriculum Statement (RNCS) integrated the fundamental principle of inclusivity.

EWP6 created the need for a new process to screen, identify and support learners who experience barriers to learning holistically and appropriately in order to enhance learner participation and inclusion in the classroom and school. Consequently, to further enact inclusive education, the national Strategy on Screening, Identification, Assessment, and Support (SIAS) was introduced in 2008 and a revised document was published in 2014 (DBE, 2008, 2014). In line with the socio-ecologic model, the SIAS acknowledges the contextual influences on learning (DBE, 2008; Geldenhuys & Wevers, 2013; SA, 2014). It provides educators with a toolkit that includes guidelines on early identification, how to complete learner as well as diagnostic profiles and forms where the assessment of support needs can be described. Individual support plans (ISP) to determine the nature, level and monitoring of support required for the learners are also part of the SIAS. A key goal of the SIAS is to identify the best learning sites and for provisioning of additional support for learners identified as experiencing barriers to learning. The SIAS attempts to limit the unnecessary placement of learners in special schools and provides guidelines on the central role of parents and teachers in implementing an inclusive education strategy (DBE, 2008). It further provides indicators and guidelines for support
programmes that enable the teacher to support learners and ensure maximum participation by all learners on their specific level of need (DBE, 2014). However, the SIAS does not force the teacher to make a specific diagnosis in order for the learner to benefit from intervention, but it enables the teacher and the school to understand what the support for the learner entails and to enhance delivery of the curriculum in relation to their home and school context.

Despite the above-mentioned developments, the implementation of inclusive education in South Africa still experiences some challenges which will be discussed next (Bornman, & Rose, 2010; Makoelle, 2012; Donohue & Bornman, 2014).

2.4 CHALLENGES TO IMPLEMENT INCLUSIVE EDUCATION IN SOUTH AFRICA

Challenges that hamper effective implementation of inclusive education will now be discussed under the following headings: medical deficit model; lack of resources; large classroom numbers; poverty; lack of parental involvement; flexible curriculum; appropriate language and communication; support structures; the teacher and inclusive education.

2.4.1 Medical deficit model still dominant

One of the key challenges that prevent education in South Africa of becoming fully inclusive is the application of the medical deficit model that is still dominantly employed—instead of a socio-ecological model (Lewis & Norwich, 2005; Florian, 2007; Florian, 2008; Florian & Linklater, 2010; Swart & Pettipher, 2011b; cf. 2.2.1 & 2.2.2). It is important to emphasise the viewpoint that learners within the South African social and school context, struggling to succeed in school, mostly experience barriers to learning because of contextual and systemic factors (Ainscow & Cesar 2006; DBE, 2008; Reindal, 2008; Swart & Pettipher, 2011a). Therefore, the term barriers to learning, associated with the socio-ecological model, is preferred because South Africa has supposedly moved away from the medical model, which is linked to special needs. The continuous application of the medical model, especially when health professional experts still need to be involved, hampers teachers’ confidence to believe that they can successfully teach and support learners, who experience barriers to learning. Therefore Barron and Amerena (2007) as well as Warnock (2005) caution that care should be taken that teachers and other role players (such as health professionals) do not continuously refer to inclusive education in the same discussion as special educational needs (SNE) and the placement of SNE learners within special education settings or including them into mainstream schools. Stromstad (2003, p. 34) underlines this misconception: “Inclusion seems to be understood as merely a reform of special education with the same basic assumptions.” The assumption that inclusive education is only about SNE can therefore encourage a negative supposition that inclusion cannot work, since the focus continues to be on the difficulties when a learner who experiences barriers to learning...
is included into mainstream. This could impede the understanding that inclusive education is essentially about inclusive values, principles and practices focusing generally on equity, participation and access. Researchers like Petrou, Angelides and Leigh (2009) plead for distance between the fields of inclusive education and SNE so that inclusive education can be fully acknowledged for its stance that schools are about belonging, nurturing and educating all learners regardless of barriers or differences in ability, culture, gender, language, class and ethnicity (Pfeiffer, 2002; Kozleski, Artiles, Fletcher & Engelbrecht, 2007).

2.4.2 Lack of resources

EWP6 (SA, 2001) declared that adequate financial and human resources would be given to ensure the transformation of the education system to being fully inclusive; however, 14 years later insufficiency of appropriate learning materials, as well as financial, physical and human resource shortages, is still a reason that inclusive education is not being effectively implemented. A number of research reports, such as Wildeman and Nomdo (2007), Quane and Glanz (2011), Krishnaratne, White and Carpenter (2013), Gous, Eloff and Moen (2014) as well as Sayed and Ahmed (2015), affirm that quality and inclusive education will not be achieved if the lack of resources is not addressed. They refer to resources such as books, chalkboards, writing materials, Braille equipment, sign language interpreters, hearing devices, communication technology, and specialised teachers who are able to apply these resources appropriately and who can consequently adapt their pedagogical instructions.

Examples of inadequate learning material resources are the following: the Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ III as cited in South African Human Rights Commission [SAHRC], 2012) revealed that in 2007 only one in every five learners had access to basic learning materials. Also on average, only as few as 45% of learners had access to reading books and 36% to mathematical textbooks. In 2011, 79% of schools had no library; of the 21% with libraries, only 7% were fully stocked and 85% of schools had no laboratories; 77% of schools had no computer centres, and of the 23% that had computer centres, only 10% were fully stocked and 17% of schools had no sports facilities. The SAHRC (2011) further revealed that 70% of the per-learner costs allocated by die DBE for Gr 1 learners were allocated to Gr R learners. The reason being, to start a part of the “Action Plan 2014: Towards the realisation of Schooling 2025” (National Planning Commission, 2011); however, many Gr R classes still lack a significant number of basic learning and teaching support material:

- 4% had no chairs;
- 12% had no tables;
• 39% had no blackboard;
• 32% had no play blocks;
• 12% had no crayons; and
• 36% had no paper.

These kinds of shortages, starting in Grade R, occur in the rest of the school grades as well.

However, it needs to be mentioned that based on several reports, including the aforementioned, the DBE committed itself to attempt improving the resources at schools. For example, a Minimum School Bag Policy (DBE, 2011a) as part of Action Plan 2014: Towards the realisation of Schooling 2025 (SA, 2010), was introduced. This policy requires that the minimum quantity of learning materials must be provided to all learners. It also established the “3T” campaign that focuses on Text, Time and Teaching in the process to develop and deliver textbooks and literacy workbooks for all learners from Grades 1—9, as well as translating workbooks for the blind into Braille (SAHRC, 2012).

2.4.3 Large classroom numbers

EWP6 (2001) and the National Policy for Equitable Provision of an Enabling School Physical Teaching and Learning Environment (2010) obliged the education department to ensure access and adequate space for all learners in classrooms. De Lannoy & Hall (2012, p. 2) purports that school LERs are calculated by dividing the number of learners by the number of educators in that specific public school. Educators may include principals or other teaching support staff in schools. The national and provincial learner-to-educator (LER) ratio (within the nationally and internationally desired level) is set at a maximum of 1:40 in primary schools and 1:35 learners per educator in secondary schools (De Lannoy & Hall, 2012). There are, however, no specifications for the appropriate number of learners with disabilities per class (SAHRC, 2012). However, in 2011, the DBE acknowledged that about 15% of public schools had more than 50 learners per class (SA, 2010), because of a shortage of teachers (SA, 2010) and the lack of mostly financial ability or mismanagement of a school to employ more educators where needed (De Lannoy & Hall, 2012). These large classroom numbers contribute to teachers protesting that they are not able to implement inclusive education successfully, since they experience it as very difficult to address the range of diverse needs in such a class (Subban & Sharma, 2005; Bourke, 2010).
2.4.4 Poverty

Poverty in South Africa is a harsh reality. Since many schools (particularly rural schools like in the sample in this study) are situated in areas with poor socio-economic circumstances, it results in schools having limited resources. According to statistics of the National Professional Teachers' Organisation of South Africa (NAPTOSA, 2003), 53% of schools in the Free State Province, where this research took place, are poverty-based schools in the first 2 quintiles (cf. Chapter 4.6.1 & Chapter 5.5). Consequently, to enact inclusion through the adaptation of curriculums and additional learning support, is not a priority for these schools where learners and the community suffer from desperate poverty (DBE, 2011e; Prinsloo, 2011; Strydom, 2011; Donohue & Bornman, 2014; SAHRC, 2014). According to Payne (2003, pp. 16-17) the term poverty relates to “The extent to which an individual does without resources.” Barrett and Carter (2013, p.1) refer to it as a “poverty trap.”

Addressing the issue of poverty is important, not only from an educational perspective, but also for social and ethical purposes. When learners are hungry or ill, lack basic skills, parental support, self-esteem or language proficiency, as a result of poverty, effective learning cannot take place (Acker-Hocevar & Touchton, 2002a; SAHRC/United Nations Children’s Fund (UNICEF) South Africa, 2014). Often under-qualified teachers who are struggling to get a teaching post, are appointed at poverty-based schools where classrooms are rundown and where they lack tuition resources—all of these adding to their frustrations in being able to teach effectively. Many of the school environments in poverty-stricken areas have unkempt premises, inadequate furniture and substandard bathroom facilities. These factors can result in a lack of respect for the self, peer learners, parents and the environment (Acker-Hocevar & Touchton, 2002c; SAHRC/UNICEF, 2014). Parents living in poverty-based environments are often in need of health and social care, have low educational qualifications, are illiterate and have a negative attitude towards the school which results in them not prioritising education for their children (Acker-Hocevar & Touchton, 2002b; SAHRC/UNICEF, 2014).

2.4.5 Lack of parental involvement

It is generally accepted that positive parental involvement will encourage a learner’s learning development. EWP6 (SA, 2001) acknowledged that parent involvement and support are crucial to ensure that inclusive education succeeds. In the case of learners that experience barriers to learning, parent support is even more vital, since what happens at school needs to be carried over to the home to ascertain continuity. Despite many parents who feel that it is predominantly the teacher’s responsibility to teach and support their children, several factors hinder parents to become supportive. This could include factors such as illiteracy, long working hours, transport problems, illnesses, etc. (Rayment 2006; Marais & Meyer, 2010; Modisaotsile, 2012).
The non-recognition and non-involvement by parents of the importance of education as well as the belief that teachers should be the main educators, is becoming a tendency and results in absent parenting in learner education. This places the teacher in a difficult position in many instances when dealing with learners with behavioural problems or when reaching out to parents to increase learner potential (Wolhuter & Oosthuizen 2003; SA, 2010; Swart & Phasha, 2012).

2.4.6 A flexible curriculum

Successful inclusion runs parallel with a flexible curriculum. In an inclusive school environment, the curriculum must allow flexibility to incorporate appropriate assessment, support and intervention procedures. It also includes the use of relevant teaching material, taking diverse learning styles into consideration, as well as learners’ rate of learning, and adapting classroom management and organisation to meet diverse learning needs (SA, 2001; Väyrynen, 2003; Loreman, 2007; Geldenhuys & Wevers, 2013; DBE, 2014). Currently in South Africa, however, the curriculum requirements do not allow much flexibility to address a diversity of needs. Teachers report that they are pressured to cover the curriculum within certain time limits which restrict them from making adaptations or accommodations for learners who experience barriers to learning or who struggle to keep up with the general progress pace of other learners (Trostle Brand, Favazza & Dalton 2012; Nel et al., 2013; Swanepoel, 2013). An example of this is the CAPS workbooks (cf. 2.3.3) that are provided to Foundation Phase teachers. It adds to a regulated learning programme where the pace and sequence is prescribed on a daily and term-by-term basis with worksheets to improve listening, reading, writing and numeracy skills. This leaves less responsibility for educators to do curriculum interpretation of the outcomes (DBE, 2011) but also less flexibility to support learners who experience barriers to learning in the classroom.

2.4.7 Appropriate language and communication

Language is the foundation for learning (Owens, 2004) and forms an integral part of ‘literacy’ in the Foundation Phase curriculum (Motshekga, 2010). Teaching and learning for the majority of learners in South African schools takes place through a language which is not their first language, and results in many of them experiencing barriers to learning. The choice of language of learning and teaching (LoLT) is usually English, since parents and teachers believe that it will provide better access for learners into academic and career opportunities (Theron & Nel, 2005; Nel & Theron, 2008). However, learning in one’s second language places the learner at a disadvantage in terms of the teaching and learning process, and leads to linguistic difficulties, which contribute to learning disabilities (Quane & Glanz, 2011).
The fact that 40% of children in South Africa come from very poor backgrounds (with limited access to printed material and exposure to English in their homes) does not support the improvement of language and communication in the schools at all. What adds to the problem is that many parents in poor communities are illiterate and therefore do not always value their role in developing their children’s literacy skills (Nancollis, Lawrie, & Dodd, 2005). In many instances, this results in learners entering formal education in the Foundation Phase (FP) not having adequate and age-appropriate listening and language skills (Justice & Kaderavek, 2004).

In many cases learners, especially from low socio-economic areas, struggle to shift from the more informal language used at home to the abstract and decontextualised academic language used in the classroom (Justice & Kaderavek, 2004). This is even a bigger challenge when learners are learning in a second language. These learners may therefore require more support than their peers (DBE, 2008).

Many teachers are teaching in their second (even third or fourth) language and, as a result, lack conceptual knowledge in the LoLT (Theron & Nel, 2005; Nel & Theron, 2008). As a result they often use out-dated teaching practices such as rote learning by drilling and chanting, that do not facilitate learning (Lessing & De Witt, 2008) especially where flexibility with regard to teaching and learning approaches is emphasised in an inclusive education environment.

### 2.4.8 Support structures

Support for teachers is vital because of the increasing demanding roles they fulfil in the classroom and school, especially since they generally feel that they do not have the necessary pedagogical knowledge and skills to meet the diverse needs of all the learners in their classroom. Collaborative relationships among teachers and different role players (e.g. community members, health professionals, and the District Based Support team) are therefore crucial (Strydom, 2011; Modisaotsile, 2012; Geldenhuys & Wevers, 2013; Nel et al., 2013). According to EWP6 (SA, 2001) support teams at schools also need to be in place to ensure that learners and teachers receive the necessary support. These are called the Institution-Level Support Team (ILST) or the School Based Support Team (SBST). Besides the support that the ILST needs to provide to learners and teachers, they are also required to liaise with the District Based Support Team (DBST) community based-support organisations, government departments and support providers such as health professionals. The ILST consists of nominated teachers of the school with pedagogical knowledge in areas such as learning support, life skills, guidance, or counselling, parents with an interest and skill in education, and community members who have a particular contribution to make to educational challenges. Collaboratively they should strive to identify barriers to learning, focus on in-service training,
facilitate the sharing of resources between role players, ensure parent involvement, plan preventative strategies and monitor learning support progress (DoE, 2004; Pather, 2004). Yet, research revealed that support structures in especially mainstream schools do not necessarily function successfully (Engelbrecht et al., 2003; Engelbrecht et al., 2005; Nel et al., 2013). Geldenhuys and Wevers (2013) point out that a crucial factor for ILST’s not functioning, is when school principals, as leaders in the support structure, have a negative attitude towards inclusion. Their attitudes could either positively or negatively influence collaboration in and between support structures. Wildeman and Nomdo (2007) purports, along with Schoeman (2012, p. 2) that many DBSTs and ILSTs are not yet adequately skilled to

provide curriculum, assessment and instructional support in the form of illustrative learning programmes, learner support materials and equipment, assessment instruments and professional support for educators at special schools or resource centres, full service and other educational institutions as indicated in the EWP6 (SA, 2001).

The DBST is a management structure at district level with the important role and responsibility to coordinate and promote inclusive education through training, curriculum delivery, distribution of resources, infrastructure development, identification, assessment, and addressing of barriers to learning (DBE, 2005). The DBST must provide leadership and general management ensuring that schools within their district are inclusive centres of learning, care and support (DBE, 2014, p. viii). For the teacher on grassroots level it means that the DBST should supply support to them in their day-to-day demands of educating diverse groups of learners from different socio-economic backgrounds and limited educational circumstances (Hay, 2003). However, a study of Makhalemele and Nel (2015) found that poor availability of infrastructure, ineffective functioning of Special Schools as Resource Centres for the DBSTs, insufficient communication and collaboration with both provincial and national departments of education hinder these teams to provide efficient support to schools.

In an attempt to further support teachers, the DBE introduced structures like the Planning and Delivery Oversight Unit (PDOU) to improve curriculum delivery and learner achievement through strengthened support by district offices, as well as the National Education Evaluation and Development Unit (NEEDU) to support delivery of the curriculum and other policies designed to enhance quality of teaching and learning. NEEDU is established in terms of the National Education Evaluation and Development Unit Act (2011) as an independent evaluation body to make recommendations relating to poor educational practices and to develop teacher capacity. The DBE also committed itself to ensure basic management processes to be followed,
Chapter 2: A discussion on inclusive education in the South African context

... to improve frequency and quality of the monitoring and support services provided by district offices to schools (SAHRC, 2012).

Teachers play a central role in addressing the above challenges to ensure that inclusive education is implemented successfully (SA, 2001) and the main purpose of this study is to ascertain if in-service teachers are adequately trained to do this. The next section, therefore, focuses on the teacher in the inclusive classroom.

2.5 THE TEACHER

2.5.1 The teacher and inclusive education

The teacher is pivotal to ensure the successful implementation of inclusive education (SA, 2001; Engelbrecht, 2007; Forlin, Cedillo, Romero-Contreras, Fletcher & Hernández, 2010; Modisaotsile, 2012). This study focuses specifically on how the teacher in the classroom understands and deals with inclusivity and how a HEI can improve the knowledge and skills of in-service teachers who chose to further their studies in this area. It is, therefore, important to discuss issues such as attitudes towards inclusive education, level of training and the competency of teachers to implement inclusive education.

Since the teacher is at the forefront of transforming the school into an effective inclusive school, the ethos of the school and the attitude of the teacher are crucial for successful inclusion (Swart, Engelbrecht, Eloff & Pettipher, 2002; Subban & Sharma, 2005). Teachers’ feelings, beliefs and values affect the meaning that they bestow on a situation and it reflects in their conduct towards learners in the classroom. In an inclusive classroom environment, the teacher has to be sensitive to the diverse needs of learners (Kokot, 2011). A positive attitude is consequently essential to promote equal treatment among diverse learners in a school. However, often negative attitudes of teachers towards inclusive education are not based on conceptual arguments, but rather on practical implementation, and achievement in the classroom. Savolainen, Engelbrecht, Nel and Malinen (2012) assert that the teacher’s attitude towards inclusive education will evolve the moment she experiences success in the implementation thereof. Yet, currently teachers in South Africa feel overwhelmed and with their backs against the wall because of continuous changes in the curriculum as well as the demands of dealing with diverse needs and specific issues such as discipline problems without appropriate guidance and support from the department (Schoeman, 2012; Geldenhuys & Wevers, 2013; Nel et al., 2013).

EWP6 describes the teacher as the primary source for achieving the goal of an inclusive education and training system (2001, p. 18). This, though, requires that teachers be thoroughly trained. Being well trained enables teachers and furnishes them with an enhanced level of
competency to effect inclusive education. Pedagogical knowledge on how to identify and address barriers to learning by differentiating the curriculum, assessment and classroom methodologies is of essence in the inclusive classroom. Inadequacies in the afore-mentioned is one of the greatest barriers to inclusion that make teachers feel incompetent to deal with inclusion, diversity, behaviour problems and disabilities (Forlin, 2008; Savolainen et al., 2011; Nel et al., 2013).

The Department of Higher Education and Training (DHET) released the Policy on the Minimum Requirements for Teacher Education Qualifications (MRTEQ) in 2011 (DHET, 2011) in which inclusivity is incorporated as part of pedagogical, practical, and situational learning and forms an important aspect of both general pedagogical knowledge, and specialised pedagogical knowledge. General pedagogical knowledge is knowledge of the learner, learning, the curriculum and general instructional and assessment strategies. Specialised pedagogical knowledge is knowledge on how to present concepts, methods and rules of a discipline in order to create appropriate learning opportunities for diverse learners and how to evaluate their progress. Situational learning is to understand the challenges learners are exposed to in a complex and diverse South African society (DHET, 2011). It is evident that the Department of Higher Education and Training is attempting to capacitate all pre-graduate, as well as in-service teachers enrolling in further academic studies, to be able to teach in diverse classrooms.

Before the MRTEQ (DHET, 2011), an Advanced Certificate in Education was in place at HEIs for in-service teachers who wanted to improve their qualifications and become more specialised in specific subject fields. Trends in Teacher Education (2010) reported that, up to 2010, 2408 teachers received an ACE qualification in the field of inclusive education (cf. 1.2). The participants of this study enrolled in the ACE programme (cf. 1.2). However, 2010 was the last year teachers could enrol for the ACE in learner support.

Schoeman (2012, p. 2) critiqued the HEIs in stating that there is no consistency in the conceptualisation of terminology or methodology regarding the programmes that are supposed to prepare teachers for inclusive education. The names of programmes that are being used include learning support, learner support, inclusive education, values and human rights education, learning difficulties or special needs education. She asserts that the inconsistency of the terminology can result in inadequate training by misdirecting the focus of the training programme from inclusive education to special needs. In addition to this, CESM (Classification of educational subject matter) codes only refer to special needs and therefore all new programmes had to changes their names from learner support to special needs education (DoE, 2008) This could continue with the focus on and practice of the medical deficit model (Ainscow
Rous (2010), as well as Faller (2006), cautions against HEIs that are preparing teachers for inclusive education with ideal textbook versions of inclusive education, but not for the challenge of practical application. Researchers like Florian (2010), Slee (2010), Florian and Linklater (2011) emphasise that the training of teachers for inclusive education entails much more than the ability to identify different versions of disabilities. The focus needs to be on developing the competence to understand and apply an inclusive pedagogy with specialist knowledge, instilled with practical abilities, and an ethos and culture of inclusion. Another key competency for teachers is to gain the capability to become critical and self-reflective by monitoring the effectiveness of their classroom interventions and based on that modify their practice in ways, which are conducive to meeting the needs of all learners within an inclusive framework. Learning from practical experience helps teachers to break away from mainly theory-based knowledge and ready-made answers (Hart, Dixon, Drummond & McIntyre, 2004; Ainscow, Dyson & Booth, 2006; Black-Hawkins, Florian & Rouse, 2007; cf. 3.3).

An important aspect of inclusive education in a socio-ecological approach is for the teacher to develop the capacity to work collaboratively. This collaboration includes other teachers in their school, teachers from neighbouring schools, parents and different role players, where they can practically expose and explore, share, challenge, and rethink their knowledge, attitude, and beliefs amongst others. This action connects practice and theoretical knowledge and thus teachers become critical friends and mentors to one another. In such collaborative partnerships teachers begin a process of developing scholarly thoughts and actions by sharing insights, evaluating, and building on such learning that has been gained together (McKinney, 2012; Nel et al., 2013).

This kind of action, where there is continuous inquiry and reflection, is what I aimed for in this Participatory Action Learning and Action Research (PALAR) research amongst the teachers in the action learning set to answer the question of How can a PALAR approach assist FP teachers to implement inclusive education in the classroom?

If the FP teacher is capacitated with pedagogical knowledge to implement inclusive education effectively in the classroom, he/she will be an asset to her teaching environment, which includes not only the classroom, but also the school and the community. Engelbrecht and Green (2001) are of the opinion that a teacher with learner support knowledge promotes school and classroom cultures that welcome, appreciate and accommodate diversity where learners feels valued, safe, connected and cared for. The teacher with learner support knowledge has the
ability to analyse the learning characteristics, strengths and needs of learners as individuals, and to plan according to these needs.

2.5.2 Being a learner support teacher in the inclusive classroom

Since the participants of this study are studying to become better enabled in learner support, it is important to provide a brief description of what is conceptualised as being an enabled learner support teacher. Rouse and Florian (2012) assert that to be a learner support teacher in an inclusive classroom, it is essential to understand both the educational and the social challenges of learners in the classroom. The teacher must, therefore, accept accountability for all learners in ways that do not marginalise or stigmatise learners as different from others. Thinking about teaching and learning must shift from “accommodating differences by providing additional or different tasks” to learners to rather challenge and extend what is generally available to all learners (Rouse & Florian, 2012, p. 16). The teacher must further create a rich learning environment characterised by learning opportunities available to everyone participating in the classroom (Florian & Black-Hawkins, 2011). This requires that teachers need to take responsibility to continuously develop knowledge and skills to be able to teach in a flexible manner and acquire strategies to support and deal with barriers to learning. This can be done through further studies or through collaboration with other teachers and experts on various topics. Collaboration with health professional experts should not only be seen as a referral strategy, but also as part of professional development. Developing reflective and critical thinking skills and making use of evidence from their teaching to inform decision-making will result in teachers not feeling “unprepared” or “unqualified” to teach learners with difficulties (Florian & Linklater, 2010, P. 371).

Since FP teachers have their learners in one class all through the school day they are able to quickly identify conditions that may encourage barriers to learning. Consequently, if the FP teacher is capacitated with knowledge about learner support, she will be able to better teach inclusively. She can adjust teaching and assessment strategies to accommodate different learning needs and also provide specific support strategies. This will minimise the possibility of placing learners in special schools or classes, because of systemic and contextual pretexts (cf. 2.2.1.3). Nel, Adam, Good and Kaminski (2015, p. 80) underline the importance of early interventions by saying that “once a child is behind, which happens early, they do not catch up unless intervention is intensive, timely and well informed.” The FP teacher must therefore be able to uncover barriers on sound observation, interviews and consultations with learners, parents and other teachers (DBE 2008), as well as being competent to reflect on his/her own teaching and support actions, previous records of the learners, and measure and ground her finding according to the prescribed curriculum (DBE, 2014).
2.6 THE ADVANCED CERTIFICATE IN EDUCATION (ACE) PROGRAMME

The participants of this study enrolled in the previous ACE programme specialising in Learner Support. The ACE programme in Learner Support was a professional training course, intended to empower and enable teachers to develop skills, knowledge and values needed to help and support learners effectively, and to contribute to improving the delivery of learner support across the school system. It strived to equip, guide and support teachers with the necessary skills to identify effective teaching strategies and implement the day-to-day support of learners experiencing barriers to learning. The programme gave teachers an opportunity to upgrade, enrich and supplement their existing knowledge in the specialised area of learner support. The inclusive education module in the programmes generally focused on theoretical framework, support structures, institutional-level support team, inclusive partnerships, learner support and the curriculum as well as inclusive assessment and support strategies. This programme also included a module on disabilities and learning difficulties that focus on physical, sensory and intellectual disabilities, learning impairments, learning differences, oral and second-language difficulties, reading difficulties and difficulties in mathematical literacy and mathematics (NWU, 2015.)

2.7 SUMMARY

This chapter conceptualised inclusive education in the South Africa education context and highlighted a number of challenges towards the implementation of inclusive education in South Africa. Since this research focuses on assisting Foundation Phase teachers to implement inclusive education in the classroom, the literature has highlighted the place of learner support in the Foundation Phase. The following chapter will focus on creating scholarship in teachers in the inclusive classroom through a PALAR process.
CHAPTER 3: DEVELOPING A SCHOLARSHIP OF TEACHING AND LEARNING IN THE ACTION LEARNING SET

“Knowing is a process, not a product” (Bruner, 1960, p. 72)

3.1 INTRODUCTION

The intention of this chapter is to demonstrate how a process of participatory action learning and action research (PALAR) undertaken by participants in the action learning set, can develop scholarship of teaching and learning for the wider body of in-service teachers enrolled in an Advanced Certificate in Education (ACE) Learner Support programme. The chapter begins with an explanation of the following terms: action learning set, scholarship, transformative learning, and development of scholarship through reflective learning. Since the development of scholarship in teaching and learning normally requires changes in values and beliefs, the chapter addresses different scholarship approaches and their impact on professional development.

3.2 ACTION LEARNING SET

An action learning set is a group of participants who strive to achieve a mutual goal and develop professionally. That is why participants must not build structures around their actions, for that will “rob” action learning of its power.

The purpose of an action learning set is not to bring people together to solve problems, but rather to learn from solving the problems (Zuber-Skerritt, 2011) when they collaborate to investigate and develop practices and understandings concerning their own contexts (Pedler, 2008). The commitments and intentions of an action learning set are based on democratic principles where the perspectives of all research parties are regarded as equally important in the construction of a coherent picture of a situation (Brockbank & McGill, 2003).

There are certain ground rules in an action learning set that include being honest with oneself and others, building trust, respecting others, their viewpoints and their values, as well as taking responsibility of one’s own actions (Pedler, 2008). On the contrary, McGill and Beaty (1992) indicate that too many rules can stultify the discussions. Participants may start asking themselves questions like “What should I be saying?” or “What do they want me to say?” The action learning set meetings must rather stimulate intellectual curiosity to activate participants to become scholars of their own teaching and learning (Zuber-Skerritt, 2011). The learning entails new thinking, therefore the advice from James, Milenkiewicz and Bucknam (2008, p. 66) is to
“avoid responding to yesterday’s challenges as today’s problems then tomorrow’s opportunities will engulf you.”

In this research project, the action learning set comprised eight Foundation Phase (FP) teachers, while I was wearing the hats of both teacher educator and researcher (cf. 4.6.3; 4.6.4).

3.3 SCHOLARSHIP OF TEACHING

The scholarship of teaching is driven by a desire to understand how students learn effectively and how teaching influences this process (Hutchings & Schulman, 1999). Scholarship emerges when participants discuss their perceptions, do self-assessment, and apply their new understandings. Scholarship further requires dissemination of peer-reviewed work to add to the body of knowledge (Trigwell & Shale, 2004; Woodhouse, 2010). (It is important to note here that in the context of this research the publication of the PhD thesis and consequent articles will be seen as the peer-reviewed work. The participants will, therefore, not necessarily be developed as publishers of academic work.) A typical scholarship investigation question could be: “Do the teaching strategies and methods that I am teaching students work in practice?” and “How can I improve what I am doing?” These questions align with the secondary research questions (cf. 1.5; 5.6) of this research project, namely “What are the needs of FP teachers with regard to the training of inclusive education and learning support?” (cf. 5.4.3.6) and “What does the development of scholarship of teaching and learning?” This means that scholarship goes beyond teaching excellence or expertise (Kreber, 2002) (cf. 5.6): it also involves systematic inquiry, leading to an in-depth understanding of a specific teaching intervention, rather than a surface evaluation of the success of the intervention. Scholarship further requires in-depth understanding of relevant literature, critical reflection and sharing new insights through publication. The scholarship of teaching also strives to develop study material beyond the traditional boundaries where teachers only transmit knowledge to students (Hutchings & Schulman, 1999; Allen & Field, 2005; Brew, 2006; Hutchings, 2007).

The intention of this research project is not only to improve learner support provided by in-service teachers in the inclusive classroom, but also to develop the habit of scholarly reflection by the teachers to allow them to add to the body of knowledge and to benefit from the research of others in the field. Currently teachers mainly perceive themselves as teachers and not as scholars (Kreber, 2007). My aim in this research is to collaborate with teachers to develop a broader understanding of and take action to improve our respective practice in the field of inclusive education.
Boyer (1990) categorised scholarship into four domains, namely: Discovery, Integration, Application, and Teaching. These domains establish pillars that support an overarching scholarship of engagement between different academic disciplines. Each one of these domains overlaps and connects with similar communities of practice, interest and concern. The adoption of such an approach begins with the understanding that higher education institutions (HEI) are part of a larger system of knowledge production. Lynton (1994) supports this and refers to the bigger system of knowledge as the “eco-system of knowledge” (p.10). In this eco-system, knowledge interacts and is shaped by community-based knowledge (Kemmis & Mutton, 2011; Kemmis, 2012). This implies that academics in different disciplines need to be aware that their intellectual territories could overlap with other knowledge fields that are not necessarily components of the HEI. Therefore, academics’ territories need to be defined more widely (Bjarnason & Coldstream, 2003) where their knowledge area overlaps with other knowledge terrains.

In this research, the teachers as participants in the action learning set act as researchers (cf. Figure 1.1) and use Boyers’ (1990) four domains to transform scholarly activities into new knowledge.

### 3.3.1 Boyers’ four domains of scholarship of teaching

Boyer (1990) emphasises that the four domains are dynamic, since the teaching itself does not comprise scholarship, but rather what has been learned from the teaching.

#### 3.3.1.1 Scholarship of discovery

Discovery is part of research and helps to create an intellectual or academic climate in the learning environment. It does not only contribute to generating new knowledge, but also refines the search for knowledge to achieve an outcome. Therefore an inquisitive mind is a vital asset in the world of discovering knowledge (Trigwell & Shale, 2004). Through the scholarship of discovery, creative problem-solving skills are developed that result in life-long learning skills (Zuber-Skerritt, 2011). In essence, where there is knowledge, there are researchers who produced the knowledge, and then there are knowledge users who read the knowledge produced by the research findings (Khan, Bawani & Aziz, 2013). The new knowledge created by research findings contributes to the vitality of the academic environment and provides new directions in which academic work can be conducted (Boyer, 1990, pp. 16-24).

Within the scholarship of discovery, teachers must encourage students to experience the ability to “think for themselves” so that the discovery of new insights can be enjoyed (Zuber-Skerritt, 2011, p. 4). This can be achieved if the teacher is a role model for students by motivating them to learn through innovative and creative activities rather than by rote learning. In this research,
the participants in the action learning set discovered new knowledge that they deemed appropriate to be included in the study material of the wider body of in-service teachers, as discussed below.

3.3.1.2 Scholarship of integration

The scholarship of integration means fitting research into a larger intellectual pattern and making connections across disciplines to be integrated into a larger body of knowledge (cf. 3.3 “eco-system of knowledge”). Integration is important, since focusing only on one discipline without understanding the bigger picture can be meaningless (Boyer, 1990). Starr-Glass (2011, p. 5) referred to this as “overlapping neighborhoods”. Integration provides meaning to isolated facts and places them in perspective. However, this requires the ability to critically analyse and interpret meaning (Stefani, 2008; Mayo, 2010). In the context of this research project, the participants in the action learning set needed to positively critique the learner support study material of the current Advanced Certificate in Education (ACE) programme (cf. 1.2) measured against their day-to-day classroom knowledge which included the National Education White Paper 6 on Special Needs Education “Building an Inclusive Education and Training System” (SA, 2001) (cf. 5.4.3.6) and Curriculum and Assessment Policy Statements (CAPS) (DBE, 2011). The participants then needed to interpret their findings in order to become aware of the value beyond their known boundaries, their teaching knowledge and their classroom, and to view their knowledge as part of a larger body of knowledge.

3.3.1.3 Scholarship of application

While discovery and integration reflect on aspects of investigation and generation of knowledge, the application of knowledge focuses on engagement. Engagement entails filling the gap between an academic environment (which include activities tied to the participants’ field of specialised knowledge and professional activities) and the needs of the world beyond their environment. Thus a higher education institution needs to serve the interests of the larger community and cannot function in isolation (Boyer, 1990).

The scholarship of application in this research project refers to whether the participants of the action learning set can apply the knowledge and pedagogic strategies gained during their training at a higher education institute to their inclusive classroom. The results of the empirical investigation will then be integrated into the learning support material used for training the wider body of in-service teachers in learner support for the inclusive education classroom. The rationale behind the research project is that various research findings indicate that teachers continue to struggle to apply theory gained from their training to their inclusive education classroom (Engelbrecht, 2006; Stofile & Green, 2006; Wildeman & Nomdo, 2007; Chataika, McKenzie, Swart & Lyner-Cleophas, 2012).
Starr-Glass, (2013, pp. 69), referred to Schön who stated that, to ensure that the moment scholarship of integration is a reality, participants need to become “reflective practitioners” who move from theory to practice, and from practice back to theory, which will make theory more authentic. That is why scholars need to engage with the world outside and not be tied to only theoretical knowledge. Then the application of knowledge will create meaning.

3.3.1.4 Scholarship of teaching

Teaching begins with what the teacher knows. Therefore, the teacher must be well informed and have a deep knowledge of his/her field of specialisation to create understanding for the students and influence their learning (Kreber, 2001; Paulsen, 2001; Braxton, Luckey & Helland, 2002; Gilpin, 2007; Mayo, 2010). Where there is clear understanding, teachers can create common ground of intellectual commitment between themselves and their students. This requires that students need to be encouraged to be active learners, to be critical as well as creative thinkers with the capacity to become life-long learners. Therefore, pedagogical procedures must be carefully planned, continuously examined, and should relate to the subject being taught. The long-term goal of teacher education should be to prepare students to be able to apply knowledge to real-life classroom settings. Since the best teacher is experience, a student really starts to understand when participates in the application of knowledge (Gilpin, 2007).

In order to ensure the effectiveness of the praxis approach in this research project, the participants strived to develop a bridge between theory and practice (praxis) by analysing, evaluating and reflecting on the study material as applicable to their classroom activities (Gilpin, 2007, p. 2). The practice, therefore, provided opportunities for reflection and development of theory which in turn gave rise to gaining knowledge from and about educational practice (Kemmis & Mutton, 2011; Mertler, 2012). However, within such a process one needs to remember that personalities and context will influence the reflection because the participants critically examine and reflect on policies, practice and difficult elements in the classroom from their own perspectives and experiences. This kind of activity could deter teacher education from becoming either “inherently conservative or becoming a dangerous doctrinaire” (Carr, 1986, p. 6), because it is not only a pure academic or theoretical action (Rayn, 2007; Altrichter, 2005).
Figure 3.1 summarises the four domains of scholarship of teaching as applied to this study.

1. Participants in the action learning set constructed knowledge

2. Applied knowledge in the classroom to test it in practice

3. Results contribute to the development of scholarship in teaching and learning within the inclusive classroom

4. Contribute to scholarly community of the inclusive education discipline

Figure 3.1: In-service teachers and teacher educator collaborate to generate knowledge about inclusive education

Applicable to this research, the four domains of Boyer (1990) have been used to transform scholarly activities into new knowledge. The process evolved as follows: the participants in the action learning set constructed knowledge and applied it to the classroom to test the knowledge in the practice. The result then contributed to the development of scholarship in teaching and learning within the inclusive classroom. The objective was to make a contribution to the scholarly community of the inclusive education discipline.

Since the focus of this research is not only to improve teaching, but also to improve learning, an integrative approach on the scholarship of teaching and learning will be presented in the next paragraph.
3.4 SCHOLARSHIP OF TEACHING AND LEARNING

The scholarship of teaching and learning is a developing effort of scholarly thought and action that draws on the joint relationship between teaching and learning at post-secondary level (McKinney, 2012). Knowledge is essential in the scholarship of teaching and learning, for knowledge not only entails knowing the discipline and pedagogical procedures but also for encouraging the ability to "transmit, transform, and extend" knowledge of the student (Boyer, 1990, p. 16; Richlin & Cox, 2004).

The overall objective of the scholarship of teaching and learning is to "encompass a broad set of practices that engage teachers in looking closely and critically at student learning in order to improve their own courses and programs" (Hutchings, Huber, & Ciccone, 2011, p. xix). This involves higher education academics sharing a commitment to knowledge creation through learning, teaching, professional development and research (Boyer, 1990). Higher education institutions (HEIs) do not only deliver instruction but also produce learning in order to enhance scholarship (Kreber, 2003; Breslow, Drew, Healey, Matthew & Norton, 2004). Therefore, every HEI needs to increase scholarship skills that involve "questioning, challenging, debating, and creating knowledge along with exploring and coming to know what is known" (Haggis, 2006, p. 525).

The scholarship of teaching and learning further entails sharing insights between the teacher and the student, after which they need to evaluate and build on the learning they gained together (Friedman and Rogers, as cited in Reason & Bradbury, 2008). In an action learning set (cf. 3.2) everyone learns from one another and no one is regarded more important than the other (Micheletti, 2010). This kind of continuous inquiry can be referred to as the holistic dialectic thinking (HDT) approach, which entails an open way of thinking and questioning (Zhang, Fung, Stanley & Isaacowitz, 2014). The holistic approach strongly depends on reflection between the different elements. During the interaction between the participants in the action learning set, they may discover contradictions in their everyday way of thinking or viewing of the world. This then requires new constructive thinking and actions about these contradictions (Carr & Kemmis, 1986; Spencer-Rodgers, Williams & Peng, 2010).

The scholarship of teaching and learning is thus an approach that combines scholarly inquiry with different intellectual tasks, which includes anything from planning or evaluating an education programme, facilitating classroom activities, trying out new pedagogical ideas, giving guidance, or to writing learning outcomes (Schulman, 1998).
For the sake of clarity, it is worth mentioning that there is a difference between the concept of scholarly teaching and a scholarship of teaching and learning. These two teaching activities differ in intent and outcome. The purpose of scholarly teaching is to achieve a better result in learning (Allen & Field, 2005). The scholarship of teaching and learning means that the scholars (participants, for purposes of this research) observe the investigation holistically and seek for connections to merge theory with practice and then communicate the knowledge gained effectively with the student by modifying their study material (Allen & Field, 2005) and thus create life-long learners. This leads us to the next section.

3.5 TRANSFORMATIVE LEARNING

Transformative learning entails developing participants into scholars (Mezirow, 2000). Mezirow’s theory of transformative learning was influenced by Kuhn’s paradigm of transformative learning (1962) and by the theories of Freire (1970) and Habermas (1971; 1984). The key ideas of these theories include the re-awakening of the adult learner’s intellectual side when engaging in critical reflection, and then start to question their beliefs, values, and assumptions, and begin to discover new perspectives. Such adults start to think about and weigh up their purposes and futures regarding their work and life from different viewpoints. In the process, they may gain confidence in their abilities that could empower them with new beliefs and experiences. When sharing and reflection take place, deep learning is inspired. This frame of thought aligns with both Freire and Habermas’ theories that an interactive learning process is necessary for transformative learning in order to realise human autonomy and higher levels of cognitive and moral reasoning (Pegg, Reading & Williams, 2007). Mezirow (1996) underlines that transformative learning encourages more far-reaching change in a person than other kinds of learning. Transformative learning experiences shape the person and produce a paradigm shift, which in turn affects the person’s later experiences, and results in professional development and scholarship.

Transformative learning is a familiar concept in the field of andragogy (adult learning) and represents the core of adult development (Mezirow 1996). In transformative learning Mezirow (as cited in Kitchenham, 2008) developed two concepts: “meaning perspective” and “meaning schemes.” Meaning perspective refers to a person’s overall world-view. The term meaning schemes includes different components that contain knowledge, values and beliefs about one’s experiences and are built on cultural, social, educational and political backgrounds. Meaning schemes can be viewed as filters through which the participants in this research discriminated and interpreted the world of their inclusive classroom. Based on their backgrounds, participants interpret the same situations differently; in a crisis some will, for instance, create meaning through a religious lens and others on a scientific explanation. Meaning schemes are not
necessarily consciously analysed and therefore not necessary reasonably or systematically articulated with each other. These meaning schemes work together to form meaning perspectives, which are the targets of transformation that take place during adulthood (King, 2005; Kitchenham, 2008). Mezirow (2009, p. 92) defines transformative learning as the process by which we transform meaning perspectives to make them more "inclusive, open, reflective and emotionally able to change." It is a process where our "taken-for-granted" meaning schemes are transformed and adapted to create critical self-reflection (Mezirow, 2000, p. 7).

Freire (1970) refers to the theory of transformative learning as “conscientisation” or “consciousness” which is a process of developing a critical awareness of a person’s social reality through reflection and action. He also asserts that through action, a person could change reality. Transformative learning is, therefore, emancipatory on both a personal and social level. It was important for Freire that people develop a critical awareness, so that they can take action against the “oppressive social reality” (Illich, 2012, p. 24). This would give people a voice while they can simultaneously apply meaning to their own world. The participants in this study may feel overwhelmed by all the challenges in their classrooms and socio-environment. By involving them as participants in the action leaning set, they can make a difference by developing scholarship in the wider body of in-service teachers.

Within the process of transformative learning Habermas (1971, 1984) differentiates between three cognitive areas in which knowledge is generated. The areas are the following:

- The technical area, which involves action to control or manipulate the environment;
- The practical area, involving interaction to explain the conditions for communication and inter-subjectivity; and
- The emancipatory area, referring to an interest in self-knowledge and self-reflection. It signifies how a person’s background manifests in the way a person sees him/herself (cf. 3.10.1).

These three areas, grounded in cognitive learning, happen in different parts of a person’s social existence. Each area has its own needs, techniques of interpretation, assessment, and inquiry. Mezirow (1990) incorporated and adjusted Habermas’s three areas into learning types and named them instrumental, dialogical, and self-reflective learning. These types of learning occur simultaneously and can, therefore, not be separated. If the adult is aware of the interconnectedness of the three learning areas, he/she will be able to critically reflect on his/her knowledge and practice which will transform the known and result in emancipation of the adult (Marsick, 1988; Taylor, 2008). The critical reflection process should “not be concerned with the
how or how to of action, but with the why, the reason for the consequences of what we do” (Mezirow, 1990, p. 13).

The participants of this study were encouraged to view the current learner support study material from the perspective of “Why do I learn” or “Why do I need to learn this information” and “What is the most effective way to implement the learning” to eventually become a scholar in the field of inclusive education. These views needed to be reflected in their diaries and in purposeful discussions (cf. 4.6.6 (b)).

The following discussion will be on the three interrelated but distinctive types of adult learning, i.e. instrumental, dialogic, and self-reflective learning, which are all applicable in this research, since the participants and the wider body of in-service teachers are all adults.

3.5.1 Instrumental learning

Instrumental learning (Kitchenbaum, 2008) refers to task-oriented problem solving that takes place in the workplace. In this study the participants focused on the facilitation of the emergence of knowledge in the inclusive classroom that leads to the scholarship of teaching and learning.

Instrumental learning is the first learning process that encourages reflection of one’s own environment, on how to learn, to explain, and to explore a situation in order to have strategic control over it. This implies that learning can be understood as an objective process, which can be analysed and assessed. For instance, the participants can ask these questions:

- How can scholarship empower us?
- How can we improve our teaching and learning?
- What can we do to accomplish a specific goal?
- Why do we need to improve our teaching and learning in the inclusive classroom?

These critical questions can enable the participants to project what they think will work best for the wider body of in-service teachers. The questions could give answers about what is good in the module content or why the specific principles of teaching and learning are followed, or what will be the best way to present a reflective assignment to the wider body of in-service teachers (Kitchenham, 2008). In the research project, information gathered in the first process can help the participants to measure the learner support study material against their authentic classroom situation, and evaluate whether the theory meet the needs of the teacher in practice.
3.5.2 Dialogic learning

Dialogic learning is a means by which we attempt to understand others through communication, which includes verbal and written tools. In dialogic learning all participants have an equal voice (equality) when reflecting on the self, values, culture, goals and policies (Rolling, 2008). Dialogue, in this research, takes place between the participants in the action learning set in their own school context by analysing the learner support study material against their teaching in an inclusive classroom. When the participants met in the action learning set, they discussed alternative perspectives, weighed evidence, analysed arguments objectively and applied critical reflection upon their own presuppositions. The participants then came up with possible solutions to pitfalls in the study material in order to improve teaching and learning in the inclusive classroom.

3.5.3 Self-reflective learning

A person's intrinsic and extrinsic understandings are influenced by beliefs and value systems, which influence how a person reflects on the self. Self-reflective learning is grounded in critical reflection and explores the why in a person's own experience by looking at why things are experienced in a specific way. The why-question aims to apprehend the meaning within the problem (Kitchenham, 2008).

This research attempts to create awareness in the participants to become critically conscious of what they take for granted about their teaching and learning, and the underlying assumptions of their values and behaviours. This has been achieved by challenging the participants to apply a different way of interpreting thoughts and patterns of action. In the end, they were able to reconstruct their previous meaning schemes to incorporate alternative views of themselves and their world of teaching by developing professionally. This helped them to better understand their role in the inclusive classroom, in the school as an inclusive organisation, as well as their roles as researchers in the development of learner support study material.

Within each of the three learning types, three learning processes occur simultaneously. These learning processes include learning within the meaning schemes, learning new meaning schemes, and learning through meaning transformation (Kitchenham, 2008; Calleja, 2014). The three learning processes will now be discussed.
3.5.4 Learning processes

**Learning within the meaning schemes** happens when the participants reflect on their present knowledge and experiences, and evaluate what works best or not.

**Learning new meaning schemes** happens when the participants acquire new knowledge that is compatible with their existing meaning schemes and then reflect whether it will work or not.

**Learning through meaning transformation** occurs within the context in which the participants function (Kitchenham, 2008; Calleja, 2014).

In this research, the context was the inclusive classroom and participants worked collaboratively to identify and analyse problems and challenges in their classrooms that needed to be addressed in the learner support study material. The participants planned strategies or actions to solve the problem, but they first needed to understand the problem before working towards a solution (Lewin as cited in Zuber-Skerritt, 2011, p. 62). However, if participants cannot find answers and patterns to solve the problems, Lonergan (as cited in Coghlan & Brannick, 2001, p. 48) suggests that they find “insight into insight and grasp knowledge about knowledge,” meaning to seek insight into different aspects such as behaviour, speech, how to grasp a situation or how to master a theoretical domain. When the participants developed a plan, for example, to modify the study material, they reflected upon it and made changes where improvements were needed. If a meaningful answer is not achieved, the different stages are revisited to redefine the problem. All the above should result in transformation of the meaning scheme and meaning perspective (Kitchenham, 2008, pp. 111-115).

Mezirow’s theory of transformative learning is an essential component of action research, since the purpose of action research is for participants to critically reflect on known knowledge and existing practice, and then to transform and consequently improve practices where appropriate (Zuber-Skerritt, 2011). As part of the action learning set, the participants shared and transformed knowledge, found a common ground of intellectual commitment, changed practices where needed and created new thinking directions to develop into scholars of teaching and learning.

The overall aim of this study is to increase and transform the wider body of in-service teachers’ (and others who work in similar contexts) repertoire of knowledge and skills. The transformation takes into consideration their intentions, beliefs, expectations and opinions to develop a capacity for abstract thinking that enables them to recognise, value, question and possibly change their ways of knowing (Kegan, 2009). Mezirow associates with this when he refers to the “disorienting dilemma.” Within the framework of the research, disorienting dilemma takes place when the participants use positive critical reflection to challenge their meaning.
perspectives by asking questions, based on the learner support study material, that are likely to
include the following:

- “What happened?” (e.g. after completion of the module, did I gain any new knowledge?);
- “Why did it not happen?” (e.g. what are the pitfalls, why do I not know how to address the
  learning disabilities);
- “Who needs to take control?” (e.g. does the problem lie with me? perhaps I did not study
  enough? Was the study material developed merely from an academic perspective?)
- “Where do we need to start?” (e.g. do I inform the teacher responsible for the study
  material?)
- “When do we start?” (e.g. do I wait until after I complete my qualification or do I complain
  now? Will it affect my progress at the HEI?).

By asking these questions new meaning might be created in the practice of teaching the learner
support modules.

In the section that follows, the discussion focuses on the changes as paradigm shifts needed for
the participants in the action learning set through a PALAR process to develop scholarship of
teaching and learning within the wider body of in-service teachers in learner support.

3.6 DEVELOPING A SCHOLARSHIP OF TEACHING AND LEARNING

Scholarship builds on the known by using relevant theory, practice-based literature and prior
research to establish a firm foundation for analysis (Kreber, 2013). This implies that new
learning is built on the foundations of old learning and when new learning takes place, existing
knowledge must be activated. The “inside” knowledge and experience of the participants of this
study gained over several years (cf. Table 4.3) must therefore not be treated as void (Shulman,
1999; 2000; 2011), since a scholarship of teaching and learning is rooted in an actual classroom
situation which is an authentic context (Huber & Hutchings, 2005).

The ultimate purpose of education is to support students to go deeper and beyond the
limitations of formal instruction to really understand and apply knowledge (Shulman, 1999; Hlas
& Hilderbrandt, 2010). When there is limited or no understanding or students are unable to use
what they have learned (inertia), they tend to forget information (amnesia). Shulman (1999)
describes inertia as passive knowledge or ideas that students gained, but cannot apply. Shulman
states that although the knowledge is not forgotten, it is not in a form that lends it to any useful
purpose beyond being remembered. Hutchings, Huber and Ciccone (2011) refer to it
as facts that the student knows, but struggles to synthesize or apply to another or different situation. Some teachers try to compensate for this by over-teaching, because they believe that not enough teaching has taken place (Shulman, 1999). Freire (1970, p. 46) speaks of the “banking” approach, which usually occurs in traditional ways of teaching. The teachers “deposit information” into students and they become dependent on the teacher to transfer knowledge and do not think for themselves: “The more students store the deposits entrusted to them, the less they develop a critical, creative conscious for self-reflecting and transformative learning” (Freire, 1972, p. 19). When this kind of teaching takes place, little or no impact will be made on students’ existing perspective of their day-to-day challenges. They will struggle to analyse and apply information or to reflect on the impact of course content on their lives. The result is that they do not gain much from the learning experience (Mayo, 2010; Hutchings et al., 2011). It is important that teachers do not fall into the habit of only transferring knowledge without keeping in touch with real-life issues and challenges (Willingham, 2007). Learning then becomes counterproductive since it does not keep in tune with the changing times and the impact that those changes might have on students’ context. Therefore, teachers must continually reflect critically in a positive way on the content and the context in which teaching takes place. This is a priority for scholarship and for the participants when modifying the learner support study material, which can be tailored to address students’ needs (Von Frankl, 2008) in a diverse teaching situation in South Africa. Study material in the context of this research forms a crucial part since self-study is the main method of learning for the wider body of in-service teachers enrolled in the ACE Learner Support programme who are distance education students.

The majority of the in-service teachers in the ACE programme are over 50 years of age (cf. Table 4.3; Armstrong, 2009; NWU-UODL, 2015) who obtained their teaching qualification before 1994 when South Africa was still under the apartheid regime. The regime did not lay a solid foundation for professional development in education and the democratic South Africa inherited a teaching force that is still seriously under-trained (Engelbrecht, 2006) (cf. 6.4.6). During apartheid, black South Africans received “Bantu Education” which provided limited instruction in subjects like mathematics and science, and was instituted to direct non-white people into the unskilled workforce (Asmal & James, 2001, p. 186). This has had devastating effects on the ability of teachers to make sense of and implement reforms. A further significant challenge is for the teachers to re-orientate themselves to new teaching ways, particularly in relation to the curriculum changes happening since 1994 (Van der Berg, 2007).
In order to develop a scholarship of teaching and learning for lifelong learning in the midst of the wider body of in-service teachers, the participants reflected critically on the ACE study material during action learning set meetings by keeping the context of the wider body of in-service teachers in mind.

- When they analysed the study material, the participants asked questions like the following: “Can I transfer knowledge from the study material to my classroom reality?”

- When setting goals and objectives, they asked questions such as “Do I have adequate knowledge to develop critical thinking skills regarding teaching and learning in the inclusive classroom?”

- When they needed to take action, they asked questions like “Do I understand the field of inclusive education to such an extent that I can apply my knowledge in the classroom?”

Questions like these are important for participants to feel “on the inside” or “part of” the course, instead of the “outside” or “alienated.” This must continuously happen when new knowledge is added (Schulman, 1999, 2000; Mayo, 2001) (cf. 5.6.1). Complaints about and surrender to the status quo is not part of the self-reflection process (cf. 6.4.7). Self-reflection is rather to investigate, to inquire, and to develop curiosity that will lead to problem solving with purposeful questions and answers (Boyer, 1990; Bass, 1999; Shulman, 2011). The approach of the participants towards evaluating and improving the learner support study material was one in which the wider body of in-service teachers will be challenged to generate authentic solutions to problems bound as tightly to their reality as possible (Mayo, 2010). Emery (2012, p. 16) stated that “Authenticity is ensured when classroom activities and assignments are strongly correlated to practice within one’s discipline” (cf. “what is question”) (cf. 5.6.1).

In developing a scholarship of teaching and learning I used Hutchings’ (2000) taxonomy of four questions as an outline to categorise different ways of investigating learning in higher education. The taxonomy of four questions is combined with Mezirow’s learning types (2009) where the participants explore actual or real-life teaching situations (cf. 5.6).

### 3.6.1 Taxonomy of questions

The different types of questions focus on the theory of what works, what is, visions of the possible and theory development. The meaning of each of these four questions is summarised shortly and followed by an in-depth discussion in the next paragraphs.

Hutchings (2000) states that “What works?” is the question that characterises the scholarship of teaching and learning. It generates a search for evidence of the relative effectiveness of
different teaching approaches. *What works?* refers to the "what questions" and is seen as "cousins" of assessment, which has a "prove it" edge. This question offers a better understanding of learning or understanding of the problem. In this research, the participants will ask "What do I want the students to know or be able to do by the end of this course?" With this question in mind, the participants modified the assignment questions to be more reflective and context based on how a teacher in the inclusive classroom will identify and then address a barrier to learning. The "know" part of the question is pedagogical knowledge in order to be informed about different kinds of intrinsic and extrinsic barriers a learner can have. The "be able to do" part is how the teacher will then address the barrier to learning by differentiating the curriculum, assessment and classroom methodologies so as to address diverse learning and teaching requirement of all learners (SA, 2001) (cf. 5.6.1).

The "What is?" question focuses on describing the different pedagogical methods and ways that students use to learn. The question evaluates traditional and innovative methods of teaching to determine the effectiveness thereof. The "What is?" question is in pursuit of "What works?" Schulman (1999, as cited in Mezirow, 2009, p. 213) states that "learning flourishes when we take what we think we know and offer it as unrestricted knowledge between our fellow students to be tested, examined, challenged, and improved before we adopt it." In this research the participants strived to adapt the assignment in such a way that the in-service teachers will engage with a critical friend, mentor or colleague by sharing experiences about their practice and learn from one another when answering the assignment questions. The vision here was to create knowledge to inform innovative school practice where theory and practice inform one another (Olson & Craig, 2000; Avramidis, 2005) (cf. 5.6.1).

The wider body of in-service teachers in this research are adults who want to know why they should learn certain things and how it will benefit them. Andragogy (adult learning) is a more self-directed form of learning because the adults have experience of life and have resources of learning. They can resent and resist situations where they feel others are imposing their will on them, and they want to use what they know and be acknowledged for having that knowledge. To adults, learning must have a purpose, e.g. to perform a task, solve a problem, and develop them professionally (Knowles, 1980b; Reischmann, 2004; Knowles, Holton & Swanson, 2012) (cf. 5.6.3).

The "visions of the possible" question leads to inquiry about what is essential and what is achievable with respect to teaching and learning in a given subject or discipline. These questions focus on goals and hopes and are designed to conceptualise teaching and learning in a specific discipline. Salvatori (as cited in Hutchings, 2008, case study 8) refers to the "vision question" as possible "windows" to uncover the essential understanding of issues in either a
particular text or in the larger content of the discipline. The participants in this research looked at what we currently have in the ACE course, and how we can improve it by rethinking the questions to make them more authentic for the wider body of in-service teachers to relate to in their inclusive classrooms (cf. 5.6.3).

The “What is?” question is closely related to the visions of the possible question (Phillips as cited in Hutchings, 2000, case study 7 & Cerbin as cited in Hutchings, 2000, case study 2). These questions help participants to “see themselves as part of the process of understanding the world around them and their position in it” (Phillips, as cited in Hutchings, 2008) (cf. 5.6.2). The participants in this research are involved in developing a solution to close the gap in the ACE course between theory and practice (cf. 5.6.3).

The fourth question focuses on “theory building.” Zuber-Skerritt (1992a, p. 226) says that “Theoretical principles can inform but cannot justify practical actions.” Therefore, practice is informed by theories and can develop new theories, but practice cannot be seen as non-theoretical and theory cannot be considered non-practical. The interaction between theory and practice (praxis) is thus significant, and again the participants strived to adapt the assignment question to be context- and practice based so that the teachers can relate and apply their knowledge in the inclusive classroom.

In this research, the participants strive to develop a scholarship of teaching and learning, that involves an intense inquiry into their professional practice to reach their aim to develop scholarship in the wider body of in-service teachers. Their professional practice is shaped by different sets of theories that focus on own practice in the classrooms. As the social and environmental forces interact, a deep understanding develops and in the process, the participants form a living theory of their own practice which is unique and does not apply to anyone else’s view but to the self (Whitehead, 2012). The living theory in this research helped us as participants to reflect and understand our lives inside and outside of the work and inclusive classroom environment. As participants we can confront the status quo of our educational practice and “generate their [our] own explanations of their [our] educational influences on their [our] learning” (Whitehead, 1989; Whitehead, 2009a, p. 87; Whitehead, 2012) when asking “How can I improve what I am doing?” Elliot (1987) points out that in the journey of understanding the self, “we risk our values and beliefs.” Risks happen because reflection includes values and beliefs that can be clarified and developed when action takes place between the participants. In the process, we as participants become aware of things that are problematic or pre-judgemental and we criticise them in the light of new meaning. We are likely to criticise them against organisational values like self-help, self-responsibility, democracy, equality, equity and solidarity, and ethical values of honesty, openness, social responsibility,
and caring for others (Breeze, 2011) which form the democratic climate of an action learning set (Zuber-Skerritt, 2011) (cf. 3.2; 5.6).

Barry (2012b) refers to a living theory as a critical and transformational social challenge and Whitehead (2009b, p. 87) asserts that a living theory is dialectical and grounded in living contradictions. Contradictions derive when people reflect on their doing and come to realise that they are not living their values as fully as they thought they were (Whitehead, 2009b). It is then that a new way forward is projected by collecting data to be able to make judgements to improve. Thus, contradictions are seen as the force of change to encourage development (Roth, Lawless & Tobin, 2000) and professional development is rooted in change when people “turn direction” (Ghaye, Melander-Wikman, Kisare, Chambers, Bergmark, Kostenius & Lillyman, 2008, p. 361) (cf. 5.6). However, to turn direction a major mind shift is required that entails the following:

- Move away from focusing on the negative, in an attempt to solve problems, but rather develop an appreciative insight to understand the root causes of success and build a better future from a positive present;

- Move away from self-learning where the focus is only on the individual and isolation towards collective learning and knowledge sharing;

- Move away from only one way of knowing and only one perspective on what is the truth to an acceptance of a pluralistic view of ways of knowing and understanding of human experience and putting the knowing to good use; and

- Move into a reflective learning (r-learning) framework that includes developing an appreciative “gaze” by reframing experiences to build a practical wisdom of achieving to move forward into the goal (Ghaye et al., 2008).

When change takes place, the participants acknowledge their success, and explain why certain aspects of their work are indeed successful and how these successful aspects can be amplified and become more consistent. This approach is not only about change, but also about improvement and sustaining success. This is why it is applicable to this research to create scholarship through a PALAR process where the participants strive together to create and sustain scholarship in the wider body of in-service learner support teachers as lifelong learners.

The participants needed to view the problems through a positive, creative and appreciative frame of mind when in the process of resolving the problems. Ghaye et al., (2008, p. 373) (cf. 5.6.3) refer to a “critical spirit” of supporting rather than opposing one another. Although it is difficult to generate (creative mode) and to judge (critical mode) at the same time, critical
reflection should be the “yang to creative thinking’s yin” (Ghaye et al., 2008, p. 373). Hurson (2008) explains the simultaneous use of critical and creative thinking as follows:

“Imagine a kayak paddle. One side stands for creative thinking and the other for critical thinking. If you always used the creative paddle, you will go around in circles. If you always used the critical paddle, you’d go around in circles the other way. The key is to alternate between the two...that way you develop enormous forward momentum” (p. 46-47).

Critical reflection needs to become analytical in the sense of narrowing down different ideas and then determining which ideas are worth following. The participants strive to answer the primary research question of “How can a Participatory Action Learning and Action Research (PALAR) approach assist foundation phase (FP) teachers to implement inclusive education in the classroom?”, and then ask “What are our successes and how can we encourage each other to build and sustain a better future from valued aspects of the positive present?”

The part that follows focuses on answering the secondary question: “How can a PALAR approach help the participants to take action, reflect on their learning, and take action informed by their learning?”

3.7 THE REFLECTIVE LEARNING FRAMEWORK (R-LEARNING)

To develop an r-learning framework, participants needed to engage in a process of critically reflecting on their work and on themselves in a positive way (cf. 5.6). They will then realise the influence they have on their own learning and on the learning that occurs where they live and work. Therefore, self-reflection needs to be critical when posing the question “How can I improve what I am doing?” If not critical, the participants only check on their practice and revisit the past. This implies that they will not evaluate whether or not they are acting in a self-reflective way that contributes to their teaching and learning (Whitehead, 2009b; Whitehead, 2014).

Figure 3.2 summarises the processes within the reflective learning framework as applicable to this research, namely: appreciative gaze, reframing; and moving forward into the goal (Ghaye et al., 2008).
The processes evolved as follows:

- In process 1, the participants viewed their current work situation, efforts, and talents with an appreciative gaze. They thought positively about their own actions and abilities and became motivated to improve and reach their goal, which was discussed in the third process.

- In process 2, the participants reframed their lived experience with an open mind and reflective approach. To reframe is not simply to refine what is already known, but rather to seek new insight and improve actions for positive productive thinking. Therefore, the participants tried to look at problems (or rather challenges) with a critical spirit and creatively searched for new insight to improve their actions for future positive productive thinking.

- Because the participants appreciated their current situation and reframed their lived experience, they had the ability to bounce back from a difficult situation in addition to dealing with uncertainties that accompanied new ventures, crises, or critique and exhibit resilience. This enabled them to move forward into the goal in process 3 (Ghaye et al., 2008) (cf. 5.6.).

After engaging in the three processes, the participants then asked, in a positive critical self-reflective way: “Can the PALAR approach help us to take action, reflect on our learning, and take action informed by our learning?” The participants could then acknowledge that they needed to answer a real-life question where criticism cannot be disengaged from a living reality
and where they “risk their own values and beliefs” to ask others to judge whether they meet the standards in their teaching and learning (Elliot, 1987).

It is important to note that the standards of judgement and viewpoints of participants changed over time. The participants needed to be open for new possibilities in teaching, in compiling study material and even in the possibility that they might be wrong. Therefore, it is imperative to focus on the positive, to stay in touch with the context where the reflection takes place and to value and respect others (Jones & Huxtable, 2006; Whitehead & McNiff, 2006; Whitehead & Huxtable, 2006).

3.8 SUMMARY

To become a scholar, a person needs to aim at the highest quality of learning and teaching. The person needs to be active in research, improve practices and take part in decision-making in the broader context of where he or she operates.

My duty as a teacher in an HEI is to encourage myself, and the wider body of in-service teachers in the learning support programme, to reflect on our teaching and learning and in the process enable us to improve and become scholars. If we follow the above-mentioned critical, reflective thinking processes where authentic and theoretical problems are related to context, perhaps then we can help students to bridge the gap between theory and practice.

The following chapter will focus on the methods used by the action learning set to generate data to identify the problems in the inclusive classroom, as well as shortfalls in the learner support study material to improve scholarship.
CHAPTER 4: RESEARCH METHODOLOGY

4.1 INTRODUCTION

In this chapter, I will describe and discuss the research paradigm and design. I will elaborate on my methodology of choice and explain the value thereof, describing the strategies that were followed to obtain data, as well as providing ethical measures that were taken to ensure the validity of the research. This will be supported with figures, and visual material of actions performed and processes undertaken during the research. My research is epistemologically embedded in a critical, transformative paradigm, following a Participatory Action Learning and Action Research (PALAR) design and working in a qualitative way to collect and analyse the data. An overview (or outline) of the methodology is illustrated in Table 4.1.

Table 4.1: Overview of the research methodology

<table>
<thead>
<tr>
<th>Research Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose and Research Questions</td>
</tr>
<tr>
<td>Primary research question</td>
</tr>
<tr>
<td>How can a Participatory Action Learning and Action Research (PALAR) approach assist foundation phase (FP) teachers to implement inclusive education in the classroom?</td>
</tr>
<tr>
<td>Purpose</td>
</tr>
<tr>
<td>The purpose of this research was to explore how Participatory Action Learning and Action Research (PALAR) can be used to adapt the study material of a distance ACE programme in Learner Support for FP teachers. The intention of this will be to develop and improve the skills of Foundation Phase teachers to practice what they have learned in the ACE in Learner Support programme in their classrooms as well as to cultivate a scholarship of teaching and learning in order to ascertain an attitude of lifelong learning</td>
</tr>
<tr>
<td>Paradigmatic assumptions</td>
</tr>
<tr>
<td>Epistemology</td>
</tr>
<tr>
<td>Design</td>
</tr>
<tr>
<td>Phases of enquiry</td>
</tr>
<tr>
<td>Literature review</td>
</tr>
<tr>
<td>Secondary research questions:</td>
</tr>
<tr>
<td>What is inclusive education?</td>
</tr>
<tr>
<td>What does learning support in inclusive education entail?</td>
</tr>
<tr>
<td>What does the development of scholarship and teaching entail?</td>
</tr>
<tr>
<td>This has been addressed in chapter 2 and 3.</td>
</tr>
</tbody>
</table>
### Literature review

#### Phase 2 – Cultivating a scholarship of teaching and learning in inclusive education

**Secondary research questions:**
- What are the challenges that Foundation Phase teachers experience with regard to their understanding of the theory of inclusive education and learning support?
- What are the challenges that Foundation Phase teachers experience relating to the practical implementation of inclusive education?
- What are the needs of Foundation Phase teachers with regard to the training of inclusive education and learning support?
- What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?

#### Method

**Purposeful discussions, observations, reflective diaries, and open-ended questionnaires**

**Selection of the site**
- 8 Foundation Phase teachers in the Free State Province

<table>
<thead>
<tr>
<th>Selection of participants</th>
<th>Purposive sampling: 8 FP teachers form an action learning set</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Data generating techniques</th>
<th>Data documentation techniques</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cycle 1</td>
<td>Purposeful discussions</td>
</tr>
<tr>
<td>Relationship-building to generate data</td>
<td></td>
</tr>
<tr>
<td>Cycle 2</td>
<td>Written opinions</td>
</tr>
<tr>
<td>Reflective diaries</td>
<td></td>
</tr>
<tr>
<td>Cycle 3</td>
<td>Informal conversations</td>
</tr>
<tr>
<td>Participant Observation</td>
<td>Record all activities such as observations; feelings; reactions &amp; behaviours, contributing to the research</td>
</tr>
<tr>
<td></td>
<td>Field notes and photographs</td>
</tr>
<tr>
<td>Cycle 4</td>
<td>Reflections on current experience and changes from focusing on problems to accentuate the positive</td>
</tr>
<tr>
<td>Open-ended r-questionnaires</td>
<td></td>
</tr>
</tbody>
</table>

#### Data analysis and interpretation

**Thematic analysis and interpretation**

#### Quality criteria of the research

<table>
<thead>
<tr>
<th>Trustworthiness</th>
<th>Transferability / process validity</th>
<th>Dependability</th>
<th>Confirmation ability</th>
<th>Catalytic validity</th>
<th>Dialogical validity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credibility and Triangulation of data collection methods; independent recording; member checking</td>
<td>Rich description of research process</td>
<td>Inquiry audit trail</td>
<td>Audit trail</td>
<td>Evidence of how the research stimulated enthusiasm for change in the participants</td>
<td>Critical feedback from the validation group on the research report</td>
</tr>
</tbody>
</table>
4.2 PURPOSE OF THE RESEARCH

The purpose of the research is twofold. The first purpose was to engage Foundation Phase teachers through a PALAR approach to improve their practical implementation of inclusive education theory in the classroom and simultaneously to develop a scholarship of teaching and learning for lifelong learning. The second purpose was to improve my own scholarship of teaching and learning in my academic practice as a teacher of inclusive education through facilitating and participating in the PALAR inquiry. The research aimed to be a journey of professional learning and development for all of us in an attempt to close the gap between theory and practice (Strydom, 2011).

4.3 PARADIGMS INFORMING THE RESEARCH

A research paradigm is a way of looking at the world in which the research takes place (De Vos & Strydom, 2011). It is a strategy that explains both epistemology and theory, as well as the methodological paradigm and methods that are to be used in the research (Birks & Mills, 2011). In this section, the focus will be on two fundamental facets of the research, namely the epistemological paradigm and the methodology.

4.3.1 Epistemological paradigm

Epistemology is the theory of how knowledge is created, which includes the methods used to create the knowledge and the limitations of knowledge and beliefs (Ladson-Billings & Donnor, 2005). In this research, I used a critical perspective as my epistemological paradigm. The participants, all adult Foundation Phase teachers and I, acted as co-researchers and created knowledge by analysing and critiquing specific thoughts and actions socially and in collaboration with one another. This happened within our working context where transformative emancipatory notions of knowledge lead to change (O’Brien, 2001; Knowles, Holton, & Swanson, 2012). These “thoughts” guide “actions” that connect theory and practice that will put “understanding” to the test. The thoughts, actions and understanding result in “grounded theory in action” (Dick, 2009, p. 6). Participants in the action learning set discover “things” of themselves and of each other, which bring positive change. “Knowledge cannot be de-contextualised” (Somekh, 2002, p. 90); if this happens, knowledge is only theoretical. That is why Somekh underlines the link between epistemology and methodology in an action learning approach.
The vision for this research was for the participants to improve and reflect positively on problems, think creatively, critically and analytically about our values worldviews, and paradigms that influence our learning and teaching (cf. 3.7.1). This happened through on-going cycles and, in the process, developed theory which is grounded in qualitative data. Participants create grounded theory by formulating concepts and test it in new situations. That again leads to new cycles of concrete experience, reflection, conceptualisation and testing (Corbin & Strauss, 2013). Zuber-Skerritt (2011) refers to the creating of grounded theory as critical thinking and asking questions outside the box. This implies that the learning, as part of the action, means more than merely generating knowledge. The participants are not passive receptors but have an opportunity to interpret and think about the knowledge claims. They experience the understanding of concepts, ideas and information, and limit misconceptions (Lucas, 2010). PALAR is a positive way to encourage growth in critical thinking skills and to empower participants to create knowledge and develop professionally. In this research, the participants took an active role in and reflected on their teaching and learning within the action learning set.

When learning takes the form of a participatory, self-reflective research, where participants reflect on knowledge, ontology (the way we view our world) and epistemology (the way we create knowledge) are influenced on the following three levels (Zuber-Skerritt, 2012):

- Practical outcomes of the problem;
- Epistemological outcomes, where transformation takes place in how the participants think about knowledge creation and theory; and
- Ontological outcomes, where transformation takes place in how they interact with one another, and how they see their position in the world (Wood, 2012).

In a participatory worldview, participants collaboratively and on equal level discover and then co-create new values, views and truths of knowledge in their living world (Marshall, 1999; McNiff & Whitehead 2002; Dick, 2007; Reason & Bradbury, 2008).

4.4 METHODOLOGY

Methodology in action research is a structured but flexible process to generate contextualised knowledge. The gained knowledge encourages change and development between participants. The action takes place in cycles of planning, action, and critical reflection with the aim to link practice and ideas. The action further creates participative communities of inquiry where participants engage and support one another, focus on practical problems, pose questions and become curious (Reason & Bradbury, 2008) resulting in human flourishing (Dick, 2003; Reason & Bradbury, 2008).
Action research differs from the traditional model of research. In traditional research, the researcher decides on a theoretical framework and then collects data to show how the theory applies or does not apply to the studied phenomenon. In action research, the researcher reviews the collected data, focuses on repeated ideas and tags it with codes. As more data are collected and reviewed, codes are grouped into concepts and themes. The themes then become the basis for a new theory that is built progressively as the research proceeds (Reason & Bradbury, 2008).

The focus in action learning and action research is to ask the right questions (Dick, 2003) that enable a participant to understand the nature of the problem at hand. Throughout the cycles of inquiry, the participants ask questions, reflect critically and test the outcomes against their practice. They then discuss ways to improve and learn from their mistakes. It is thus vital for anyone involved in action learning and action research to spend adequate time working out what the right questions are for a particular problem that needs to be solved. Action research uses a qualitative approach that will be discussed below.

4.4.1 Qualitative approach

In a qualitative approach, the researcher’s choices and actions to collect data create a research design best suited for the specific research process (Fouché & Schurink, 2011). The concept “design” in qualitative research includes the entire process of research from the initial stage of conceptualisation of a problem to the writing process. The qualitative research design is flexible and unique, and evolves throughout the research process. That is why there are no fixed steps to follow, and the research design cannot be exactly replicated (Creswell, 2012). The research is undertaken within the environment of the happening, relies on spoken words and lived experiences (Miles & Huberman, Saldaña 2013; Neumann, 2000).

This is why PALAR as a research design occurring in cycles, was applicable because the environment of research was the inclusive classrooms where the participants were teaching. In each cycle, the participants reflected on practice, took action, reflected again, and then took further action on the current situations and actions (Zuber-Skerritt, 2011). This made the research flexible so that each turn of the cycle could build on the understanding and experiences of the previous cycle (cf. Table 4.1 data generation processes). While in the process, the participants become aware of the effects of their actions in their work context. They have the opportunity to examine their work, seek opportunities to improve their teaching and learn from the past, present and the future. It makes sense that authors like McIntyre (2008) and Kemmis & McTaggart (2005, p. 575) refer to action research as “borrowing, constructing, and reconstructing research, to enlighten the process and consequences of the specific object being
studied.” A discussion of the PALAR process follows, with a figure to illustrate the different phases and cycles applied in this research (cf. Figure 4.1).

4.4.2 Participatory action learning and action research (PALAR) as research design

PALAR is not only AL and AR combined; it is rather a synthesis of all the concepts and traditions that together form a participatory paradigm of theory and practice (i.e. praxis). The participatory part in PALAR is the part where the participants collaborate and learn from each other. The research part is cyclical and provides a framework for gathering, analysing, reflecting and improving the understanding of practice in each stage. PALAR highlights the action learning aspect as well as the research aspect. This enables participants to reflect on mutual teaching and learning (Wood & Zuber-Skerritt, 2013) (cf. 1.7.3)

PALAR is a way of thinking, feeling, living and being influenced by values, world views and paradigms of learning, teaching and research. These living experiences, which are the product of self-reflective action research, influence our behaviour, strategies and methods, and therefore our capacity for improving practice (Zuber-Skerritt, 2011). To improve practice, the three R’s of PALAR – relationships, reflection and recognition (cf. 3.3) are key elements that promote a truly participatory approach to knowledge creation, as well as practical social and educational improvements. In this research, the three Rs helped the participants to understand how a PALAR approach can assist FP teachers to implement inclusive education in the classroom as reflected in the following:

- The development of a democratic, authentic, trusting and supportive relationship between the participants took place in Phase 2, Cycle 1 (cf. Figure 4.1).

- In all cycles, and between all participants, the process of continual critical reflection took place in a collaborative learning context.

- Recognition of achievement by participants took place in all cycles.

PALAR is thus the appropriate methodology to use for data generation in this research because PALAR leads to transformation of both the participants and the context in which the action takes place.

Figure 4.1 Illustrates the PALAR process that took place in two phases and four cycles of planning, acting, observing and reflecting to generate data.
Figure 4.1: PALAR’s strategic reflection and action model, taken from Zuber-Skerritt (2011) and adapted for the research.

In a PALAR project, it is important to build relations and a vision between participants within the context of the research project. This avoids problems later in practice (Zuber-Skerritt, 2011).

The following Table 4.2 represents the different action learning set sessions, the purpose of the sessions, activities done, and goals to be accomplished to generate knowledge.

**Table 4.2: Learning set sessions**

<table>
<thead>
<tr>
<th>Session</th>
<th>Purpose</th>
<th>Activities done</th>
<th>Goals to be accomplished</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Relationship building and purposeful discussions on problems impacting inclusive education in the classroom</td>
<td>Turning point exercise</td>
<td>Building trust and sharing commonalities</td>
</tr>
<tr>
<td>Session</td>
<td>Purpose</td>
<td>Activities done</td>
<td>Goals to be accomplished</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td>----------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>3 (30.05.2014)</td>
<td>Determine collective vision of quality education in the inclusive classroom</td>
<td>Analyse base line data questionnaires Review and evaluate ACE programmes’ study material Introduce reflective diaries</td>
<td>Start to create a vision for the research project</td>
</tr>
<tr>
<td>4 (20.06.2014)</td>
<td>Involve participants in improving scholarship of teaching and learning.</td>
<td>Classroom observations Purposeful discussions on the value of the ACE study material and assessment tasks Purposeful discussions on participants experience of the reflective diaries</td>
<td>Participants evaluate the effectiveness of the teaching and learning methodologies and how to adjust this for better learning outcomes.</td>
</tr>
<tr>
<td>5 (09.09. 2014)</td>
<td>Involve participants in improving scholarship of teaching and learning in higher education</td>
<td>Classroom observations Purposeful discussions on enhancement of quality in teaching and learning based on analysed data of classroom observations and study material</td>
<td>To determine actions to improve teaching methods to enable students to present knowledge in a way that they can apply the theory in the classroom. It involved alignment of planned outcomes, learning activities and assessment tasks</td>
</tr>
<tr>
<td>6 (05.11. 2014)</td>
<td>Reflecting on problems impacting inclusive education in the classroom</td>
<td>Analyse reflective diaries Complete open-ended reflective questionnaires on how to move forward</td>
<td>Get the participants’ reflections on enhancing quality of inclusive education in the classroom</td>
</tr>
<tr>
<td>7 (13.11. 2014)</td>
<td>Determine the way forward &amp; evaluate what improvement can be effected to support the inclusive education teacher in the classroom</td>
<td>Classroom observation Analyse reflective learning questionnaires. The participants agree that there is a need to rethink the construction of a learner support programme in higher education to improve quality of teaching and learning</td>
<td>Re-construction of assignments to improve teaching and learning in the inclusive classroom</td>
</tr>
<tr>
<td>8 (12.08. 2015)</td>
<td>Verify data with participants</td>
<td>Purposeful discussions</td>
<td>To ensure creation of scholarship in teaching and learning</td>
</tr>
</tbody>
</table>
4.5 RESEARCH METHODS

The research methods used to generate data will now be discussed.

4.5.1 Research site and participant sampling

For Phase 1 all 50 teachers enrolled in the ACE learning support programme were requested to complete an open questionnaire (cf. 4.5.6). The return rate of these questionnaires was 34, i.e. 68%, which is a good return rate (Lindner, Murphy & Briers, 2001).

Table 4.3 provides a profile of these teachers.

Table 4.3: Biographical information about the 50 FP teachers enrolled for the ACE programme

<table>
<thead>
<tr>
<th>Age category</th>
<th>Gender</th>
<th>Race</th>
<th>Teaching experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>31-61 years old</td>
<td>Female</td>
<td>Tswana Coloured and White</td>
<td>10 - 39 years</td>
</tr>
</tbody>
</table>

Phase two of this research continued in the Free State Province (cf. 5.4) where I purposefully (Leedy & Ormrod, 2010; Maree & Pietersen, 2011) selected eight FP teachers from one school to form an action learning set. This school was selected because it had the most teachers enrolled in the ACE programme and the school is within traveling distance from my home. Since the research entailed many visits to the school, it was a convenient sample. The school is a township school outside a rural town and consists mostly of illiterate and professionally unqualified people. Illiterate parents, grandparents or caretakers normally shy away from contact with the school and have a negative effect on the learning readiness of learners and guidance in learner homework support. This again seemed to have led to an increase in the number of learners that need special educational support (ELSEN) (cf. 5.4.2.1: 2.4.4). Since the learners are socio-economically disadvantaged, they benefit from a feeding scheme (National School Nutrition Programme (NSNP) (DBE, 2011b & d), which is a departmental initiative to quintile 1, 2 and 3 primary schools not paying school fees, so-called “no-fee schools” (DoE, 2006; cf. 2.4.4; 5.5) with quintile 1 being the poorest school and quintile 5 the least poor school.

The teachers, henceforth referred to as participants, who formed the action learning set, are older than 23 years and younger than 65 years. It was clear that the participants’ years of experience did not make a difference concerning pedagogic knowledge and skills of applying inclusive education in their classrooms. The younger participants were just as unfamiliar with inclusive education as the participants with more experience (Donohue & Bornman, 2014) (cf.
The participants were all are Afrikaans-speaking females with a minimum of 2 years to a maximum of 30 years teaching experience, taking part as active members in all the action learning set activities. The language of learning and teaching (LoLT) in the school where the research took place is either Afrikaans or English (cf. 5.5).

**Table 4.4:** Biographical information about the participants of the eight foundation phase teachers in the action learning set

<table>
<thead>
<tr>
<th>Age category</th>
<th>Gender</th>
<th>Race</th>
<th>Teaching experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>24 - 34: 5</td>
<td>All Female</td>
<td>Coloured and White</td>
<td>1 – 10 years: 4</td>
</tr>
<tr>
<td>54 - 64: 3</td>
<td></td>
<td></td>
<td>10 – 20 years: 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>20 – 30 years: 3</td>
</tr>
</tbody>
</table>

**4.5.2 Data generation process**

There are various ways to collect qualitative data. In this PALAR process, data were generated from two phases and four cycles. The following methods were relevant and appropriate (Biggs & Tang, 2007; Leedy & Ormrod, 2010; Zuber-Skerritt, 2011). The detail of how these methods were employed will be discussed in paragraph 4.6.5 to 4.6.6.

The following data collection methods were used in the data generation process:

- **Open-ended questionnaires:** a broad range of ideas, attitudes, perceptions and opinions can be generated, which can be followed up with participants, if some of the information is unclear (Mac Naughton & Hughes, 2009; Leedy & Ormrod, 2010).

- **Reflective diaries** generate subjective perspectives needed to triangulate with other perspectives. Participants become aware of obstacles and are motivated to deliberate and reflect on these (Alaszewski, 2006; Biggs & Tang, 2007; Zuber-Skerritt, 2011).

- **Purposeful discussions:** face-to-face interactions with a researcher which can establish rapport with the members and obtain rich data and valuable information on the problems the participants experience in the classroom, in this research, related to inclusive education. It also helps the researcher to view the world through the eyes of the participants (Leedy & Ormrod, 2010).

- **Observations** provide opportunities to observe while engaging in, learning from, and reflecting on activities happening with members of the action learning set (Strydom, 2011).

The following table summarises the data generation methods used in this research.
Table 4.5: Summary of the data generation methods

<table>
<thead>
<tr>
<th>Data generation methods</th>
<th>Who participate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploratíve open-ended questionnaires</td>
<td>34 FP teachers</td>
</tr>
<tr>
<td>Reflective-learning (r-learning) open-ended</td>
<td>8 participants in the action learning set</td>
</tr>
<tr>
<td>questionnaires</td>
<td></td>
</tr>
<tr>
<td>Reflective diaries</td>
<td>8 participants in the action learning set and myself</td>
</tr>
<tr>
<td>Purposeful discussions</td>
<td>8 participants in the action learning set</td>
</tr>
<tr>
<td>Observations</td>
<td>Myself</td>
</tr>
</tbody>
</table>

Data generation and analyses happened simultaneously via iterative cycles of inquiry through interaction and collaboration between the participants. The data in this research was, except for the base line data, generated by participants in the action learning set. It is thus important to explain how an action learning set functions (cf. 3.2).

4.5.3 Action learning set

An action learning set is a small group of people who meet regularly to share and reflect on common practice or solve a problem. The action learning set of this research project consists of eight Foundation Phase teachers, all females from one school with 1041 learners, which aligns with Marquard (1999) who advises that an action learning set must consist of four to eight members for the purpose of a quorum. In this research, all participants functioned in a real-time framework with real mutual problems in need of real solutions. Revans (1988, p.16) called them “comrades in adversity” with the purpose to create knowledge and clarify perceptions of reality, goals and strategies to achieve an outcome. Although we did not have a solution for our problems in the beginning of the process, we started to openly discuss, reflect, and challenge different ways of thinking (Thomas & Etheridge, 2004) which led us to the solution. That is why participants must be regarded as equally important with an open relationship to criticise one another in a positive way (Marquardt, 1999) with a mutual aim to contribute and reach the proposed outcome (Revans, 1980).

Although Dilworth and Willis (2003) advise that the members in the action learning set must be diverse to inspire various perspectives and viewpoints, it could not entirely be the case in this research due to logistic problems. In this research the logistic obstacles included accessibility to vehicles, finances and the distance between the university and the school. On the contrary, I agree with Bloor, Frankland, Thomas and Robson (2002) that the benefits of the teachers knowing each other are that they feel comfortable and confident in their discussions. Dilworth and Willis (2003) further instruct that the set must present a familiar problem in an unfamiliar
setting. They stress the point that an unfamiliar setting can open the action learning set’s perspectives to new alternatives. This was not possible in this research because of logistical constraints.

As the researcher, I formed part of the action learning set as one of the participants. Therefore, it is significant to describe my role in the action learning set.

4.5.4 My role in the action learning set

My role as researcher in the action learning set was to explore ways that I could help FP teachers to close the gap between what they are learning in the ACE programme and the application thereof in practice.

I shared with the participants my challenges, values and fears as a lecturer regarding the effective implementation of a learner support programme in higher education. I also emphasized that I valued their experience and practical knowledge and wanted to know how it could be used to influence my teaching from which the wider body of in-service teachers’ learning could benefit. I further challenged them to reflect on their current teaching and learning, and attempted to inspire them to consider alternative viewpoints and creative ideas that potentiate a deeper understanding of the application of what they have learned about inclusive education in the classroom. These shared challenges helped to answer the secondary research questions:

- What is inclusive education?
- What does learning support in inclusive education entail?
- What are the challenges that Foundation Phase teachers experience with regard to their understanding of the theory of inclusive education and learning support?
- What are the challenges that Foundation Phase teachers experience relating to the practical implementation of inclusive education?
- What are the needs of Foundation Phase teachers with regard to the training of inclusive education and learning support?
- What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?
I explained the fundamentals of the role and functioning of an action learning set to the participants. The orientation contained aspects such as emphasising the following principles:

- all participants in the set are equal;
- the importance of listening to the views of one another; and
- the primary value of action learning lies in the learning that happens.

I supported the development of a partnership amongst the participants in the creation and sharing of knowledge by respecting the participants’ knowledge and my willingness to learn from them. With this in mind, it appeared that the members did not experience me as someone in a power relation, or regarded me as the expert, but accepted me as a member of the action learning set who also wants to learn. Together we searched for conflicting arguments rather than handing out ready-made truths that could improve or solve our problems in the inclusive classroom. Although I provided guidance, I did not tell the participants how to deal with issues in the classroom. I strived to develop a learning culture amongst the participants to enhance professional development (Revans, 1988). As equal participants, we aimed to co-construct new understandings and new practical solutions to the research questions (Whitehead & McNiff, 2006). For this reason, I conducted my enquiry with the participants rather than about them.

The data collected in this research took place in two phases and four cycles that will be discussed next.

4.5.5 Phase 1: Data generation

It is important to mention that I did not make use of PALAR in Phase 1 of the research. The purpose for data collection in Phase 1 was explorative by nature (Boeije, 2010, p. 8), to understand the problems regarding inclusive education that teachers face on a daily basis in their context. I made use of semi-structured open-ended questionnaires (cf. Appendix B) to gather base-line data (Mac Naughton & Hughes, 2009) and a literature review to compare with the teachers’ perspective in the classroom. This data helped me to shape my thoughts and nature of the purposeful discussions that took place in Phase 2.

(a) Open-ended questionnaires

Using questionnaires in this research was a way to collect a reasonable amount of baseline data from 34 teachers who were students in the ACE Learner Support programme. I followed up with the 34 teachers via a telephone call or e-mail when some of the information was unclear. The baseline data included issues concerning teaching and learning, and the challenges of implementing inclusive education in their classrooms. The questions asked were based on
knowledge the teachers had on inclusive education (e.g. What is inclusive education? or What do you understand about the concept?) and pedagogic strategies (Can you apply your theoretical knowledge?). The aim of the base-line data was to gain explorative data regarding the possible problems faced by the teachers. The data was analysed systematically and coded inductively in order to develop a base-line data from where further investigations could take place. A disadvantage of the questionnaire may be that results are subjective as it could be influenced by what the teachers believed I wanted to hear (Reason & Bradbury, 2008; Leedy & Ormrod, 2010).

4.5.6 Phase 2: Data generation

As indicated before, the research process unfolded in two phases and four iterative cycles (cf. Figure 4.1). Therefore, the cycles could continuously be revisited, revised, reconsidered and reflected on. The different cycles served as strategies that led participants to form a vision of where the typical wider body of in-service teachers would want to be after completing a learner support programme.

(a) Cycle 1

After obtaining their informed consent, eight teachers formed part of the action learning set with me (cf. 5.4). This made the action learning set a purposeful sampling group (Strydom & Delport, 2011) (cf. 4.6.1). Enacting the action learning set at one school created a trusting comfort zone for the participants because they knew each other and could therefore share their experiences within a similar context. It also made travelling for them easier since not all of the participants had their own transport to drive to different locations.

When the participants and I met for the first time, I introduced them to their roles and duties as participants in an action learning set, and informed them about the aim of the research project. Since the action learning set was a new concept for the teachers to act as researchers, I provided them with clear guidelines (cf. 3.2) of what would be expected from them (McGill & Beaty 1992). As participants, we first had to be honest about ourselves before we could start to understand each other and build a relationship. To achieve this, I followed Bob Dick’s relationship-building technique (2013). In session 1 of the data generation process, each participant received a diagram of a winding rope representing our professional life. Each turn in the rope represented an experience or a person (or both) that affected our lives. I drew from Merriam and Caffarella’s (1999) theory about change to analyse the relationship-building techniques. Although relationship building was part of the process, it did not form part of data generation and, therefore, was not analysed under a research question.
From here onwards, the participants in the action learning set moved into the PALAR cycles of reflecting, planning, observing and acting by means of four different methods to generate data (Zuber-Skerritt, 2011), which included purposeful discussions, reflective diaries, observation and open-ended reflective learning questionnaires (r-learning) (Ghaye, Melander-Wikman, Kisare, Chambers, Bergmark, Kosteniuk, & Lillyman, 2008).

(b) Cycle 2: Purposeful discussions

It is important to mention that purposeful discussions happened throughout the research process between participants, although only mentioned under cycle one. In the context of this research the term purposeful discussions is more applicable than interviews the reason being that the discussions were not one-sided interviews but informal face-to-face conversations where all participants learned through shared experiences and established rapport amongst the members (Leedy & Ormrod, 2010). The latter aspect is one of the characteristics of PALAR where participants learn from one another through self-reflection and negotiated discussions (Zuber-Skerritt, 2011). It further allowed a deeper insight into the lived classroom experiences of the participants. More in-depth information could therefore be extracted by providing the participants the opportunity to hear their own words as they tell their own story (Hammersley & Gomm, 2000, p. 3). This secured frankness and significant evidence were consequently gained from the conversations (Greef, 2011).

During the purposeful discussions, the participants focused mainly on the learner support study material, how it was compiled, whether an in-service teacher will benefit from it, and if the study material is applicable to the classroom. The discussions were based on all the participants’ own classroom experiences. After the discussions, they went back to their classrooms and critically reflected and viewed their class situation against the study material, then made written or mental notes of the positive and the negative factors to discuss in the next meeting.

I made audio recordings of the purposeful discussions which helped me to move forward and backward between the cycles of data generation, to order my thoughts and to form a picture of the research process. The disadvantage of purposeful discussions is that it can become costly and challenging to analyse, which happened in this research, which took place over a period of six months (Greef, 2011).

Reflective diaries

Alaszewski (2006, p. 2) defines reflective diaries used for research purposes as a “document created by an individual who maintains a regular, personal and contemporaneous record of reflections upon aspects fit for the research.” It captures thoughts, feelings and observations to support the development of a theoretical framework (Bogdan & Biklen, 2003) and to engage
with the understanding and feelings arising within the research (Ely, Anzul Friedman Garner & Steinmetz 1991). It is, therefore, useful to triangulate other perspectives involving a literature review, classroom observations and purposeful discussions (Zuber-Skerritt, 2011). All the participants were introduced to reflective diaries in session 3 of data generation. Everyone had to diarise their thoughts and experiences of what happens in the classrooms which were then discussed during the following action learning set meetings. The participants only read data from their diaries which they felt comfortable to share and which were applicable to the research project. The diaries gave all participants an opportunity to voice their thoughts and reflect on it in during the action learning set meetings. As some of the participants diarised inner thoughts and feelings, we agreed that participants only handed in applicable parts of their reflective diaries, which I would analyse, with the following three secondary questions in mind: What are the challenges that Foundation Phase teachers experience with regard to their understanding of the theory of inclusive education and learning support?

- What are the challenges that Foundation Phase teachers experience relating to the practical implementation of inclusive education?

- What are the needs of Foundation Phase teachers with regard to the training of inclusive education and learning support?

- What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?

My diary helped me to guide the pre-planned schedule for the action learning set meetings. By nature, PALAR is flexible and data collection and analysis happens simultaneously, thus I also made field notes about my own observations, feelings, reactions and behaviour of the participants.

A disadvantage of reflective diaries is the difficulty to analyse the data because participants can reveal inner feelings and thoughts with which I had to deal sensitively as I regarded it as my ethical duty. Another disadvantage is that a participant might not necessarily be consistent in keeping the diary (Alaszewski, 2006). In this research, I randomly sent text messages or images of encouragement to the participants to thank them for their collaboration in the research. It appeared that this served the purpose of reminding them to diarise their thoughts.

(c) **Cycle 3: Participant observation**

Participant observation is a research procedure typical of a qualitative approach which provides an opportunity to observe while engaging in, learning from, and reflecting on activities happening with other participants. With participant observation, close contact between
participants can be maintained and the role of the researcher becomes a reflection of her involvement as observer and participant (Strydom, 2011).

In this research, I observed the participants as teachers in their inclusive classroom environment to address and triangulate some of the secondary questions: What support do they have and need in inclusive education? and What are the challenges that FP teachers experience relating to the practical implementation of inclusive education?

I arranged with the school for classroom observations, which took place during sessions 4, 5 and 7 (cf. Table 4.2) before the action learning set meetings. The observations went beyond the focus on teaching techniques and strategies that the participants use in the inclusive classroom. My observations were therefore not only on lesson goals, objectives, strategies or forms of assessment, but rather more of an opportunity for me to develop an understanding of the activities occurring in the real-life context of an inclusive classroom. I could experience the inclusive classroom through their eyes and could measure the day-to-day experience against the study material of a learner support in-service teacher.

One of the disadvantages of observation is that the observer needs to be aware of not becoming partial to the observant and losing one’s sense of objectivity (Kylmä, Vehviläinen-Julkunen & Lähdevirta, 1999). I had to remind myself constantly to remain objective, because I had close relationships with the participants as well as empathy with their frustrations in the classrooms.

(d) **Cycle 4: Open-ended reflective-learning (r-learning) questionnaire**

Open-ended questionnaires are appropriate when seeking deep insight into the views of those who are taking part in the research. Participants use their own words when giving self-expressive, creative and detailed answers. Open-ended questionnaires help a researcher to understand how participants think and to discover what is important to them. It further reveals their logical thinking and frame of reference (Delport & Roestenburg, 2011).

The aim of the r-learning questionnaire in this research was for the participants to reflect on their work and lives in the inclusive classroom. Through the observations and reflective diaries, they strived to answer the secondary question “What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?” The participants were encouraged to accentuate the positive by focusing on the best experiences rather than focusing on the problems. We needed to look at “problems” in a creative and appreciative frame of mind and with a “critical spirit” (cf. 3.8). To achieve positive results does not have to be about getting rid of problems or “fixing” things that are not going well, but rather to identify, reflect and focus on assets (Ghaye et al., 2008). This argument embraces Habermas’s emancipatory interest of
developing skilfulness and making wise and practical decisions to improve the well-being of particular participants (Habermas, 1974, 1996. cf. 3.6). This means that as participants we aimed to improve our living theory, to free ourselves from habits, illusions and customs, which may be contrary to our wants, needs and desires (Whitehead, 2012).

The reflective questionnaire, deductively based on the framework of Ghaye et al., (2008) comprises essential and mutually supportive processes of developing an appreciative gaze, reframing lived experiences, and moving forward into the goal.

- **Developing an appreciative gaze** required the participants to look into their current practice and indicate the positive results.

- **Reframing** lived experiences involved looking at the problems in the inclusive classroom and the study material with a creative critical spirit, and contemplating the alternative innovative approaches to follow.

- **Moving forward** into the working practices was inspired by ethical actions and moral courage based on things the participants felt worth valuing, celebrating, and sustaining. Moving forward was about not only refining what was already known, but seeking to generate new insights and to improve actions (Ghaye et al., 2008).

### 4.6 DATA ANALYSIS

The data analysis of this research was influenced by my epistemological and ontological paradigm towards reality in the inclusive classroom. The research question “*How can a PALAR approach assist FP teachers to implement inclusive education in the classroom?*” focused the lens through which I looked at the data.

The baseline data were collaboratively analysed in the action learning set meetings by the participants, and the rest were analysed by myself and verified with the participants. Qualitative data analysis is a process of transforming data into an answer derived from a research question (Fouché & Schurink 2011). Once the data had been collected, the grounded theory analysis was done in the following stages.

Lacey and Smith (2010) point out that data in action research can be vast and thus be overwhelming, therefore I started with data reduction where I identified and categorised the data before the coding process started. Coding proceeded from open to selective coding and then to theoretical integration of concepts. The concepts developed through constant comparison with other slices of data, which were informative conversations, observations, reflective diaries and r-learning questionnaires. The emerging themes and their connections were integrated with
existing theoretical literature to find how they all fit together in categories. This formed the theory of the research project and answered the primary research question (Saldana, 2013; Flick, 2011).

Coding is not only part of data analysis: it is the “fundamental analytic process used by the researcher” (Corbin & Strauss, 1990, p. 12). It is the axle between collecting the data and developing a theory that explains the data and carries the researcher and the data from transcript to theory (Walker & Myrick, 2006). Boeije (2010) explains open coding as taking initial data, breaking it into pieces, comparing the pieces and assigning it into groups that address the same themes. It starts with small segments of data that are coded line by line (in this research with different colour pens) and then writing the codes in the margin of the text, to subsequently categorise and summarise each piece of that data. This process repeated itself throughout the analysing process. The aim is not only to analyse data, but also to understand the context in which the research takes place and the people involved. The next step involves theorising. Similar examples are put together and linked to a larger concept. Throughout the process, the participants together or I by myself compared concepts (cf. Table 4.2) and started to form theories (Boeije, 2010; Saldana, 2013; Flick, 2011).

The intermediate step happened continuously throughout the whole process from coding of the first line of text to the first draft of the completed analysis. It entailed memorising and theorising all field notes about concepts where the participants outlined their observations and insights. In April 2014 I did the very first analysis of relationship-building data on my own and verified it with the rest of the participants in the following action learning set meeting. I used a deductive data-analysis approach from Merriam and Caffarella’s (1999) theory about change. I felt comfortable to use firstly a deductive approach as I was a novice researcher and, secondly, I wanted the relationship between the participants to be strong and did not want to grab ideas from nowhere.

As the coding themes emerged, the participants together, or I by myself, integrated, refined and wrote up all theories around the central problem (cf. Table 4.2). In May 2014, all the participants read the base-line data and decided on the themes and categories to analyse the data with. This step glued the vision and need for the research project together (Boeije, 2010).
When doing qualitative research, and specifically reflective diaries, it is important to keep the research question in mind to narrow the scope. The reason for this is that the research begins with an open mind, without preconceived ideas of what will be found, because the aim is to generate a theory based on the gained data and research observations from the real world (Patton, 2002). On 30 May 2014 the participants were introduced to the reflective diaries and on 5 November 2014 the “journey” (cf. 5.4.2.1) of keeping the reflective diaries was completed. I analysed the reflective diaries inductively with three of the secondary questions in mind:

- What are the challenges that Foundation Phase teachers experience with regard to their understanding of the theory of inclusive education and learning support?
- What are the challenges that Foundation Phase teachers experience relating to the practical implementation of inclusive education?
- What are the needs of Foundation Phase teachers with regard to the training of inclusive education and learning support?

Throughout the whole research project, purposeful discussions took place between the participants in the action learning set meetings. The discussions were transcribed and were valuable for gaining insight into the contextual activities of the participants and strengthening our relationship.

4.6.1 Measures to ensure trustworthiness

Trustworthiness is ascertained under categories equivalent to internal and external validity, reliability and objectivity. Trustworthiness can match internal validity, transferability matches external validity, and dependability matches reliability (Sikolia, Biros, Mason & Weiser, 2013).

(a) Credibility in trustworthiness

Credibility refers to how much the collected data accurately reflects the different realities of the phenomenon (Sikola et al., 2013). It is established through lengthy engagement with informants and triangulation of data from a variety of sources and is a concept resonating with trustworthiness. The aim of trustworthiness in qualitative research is to verify if the collected data answers the research question (Denzin, & Lincoln, 2005). Trustworthiness also links with internal validity (Morrow, 2005). Internal validity refers to real and reliable instruments measuring the content (Sikolia et al., 2013). Negative analysis is the examination of cases that contradict the main findings and peer debriefs, which allows another pair of eyes to confirm the emerging concepts and themes from raw data (Brown, 2009; Carcary 2009).
matches the concept dependability where another individual audits and confirms that the correct procedures were followed (Morrow 2005).

In this research, I align myself with the viewpoint of Kemmis and McTaggart on the creeds of action research (2005). Kemmis and McTaggart argue that through collaboration with an action learning set, trustworthiness develops. Along with Kemmis and McTaggart’s viewpoint, I combined the “4 Rs” of Butin (2010), which are respect, reciprocity, relevance and reflection, to confirm trustworthiness.

The “4 Rs” are relevant because the data developed from the participants’ “own voices” (Hammersley & Gomm, 2000, p. 3).

*Respect* for the participants’ viewpoints and their everyday, real-life events (Yin, 2008, p. 4), makes it impossible for us to ignore what the participants think and desire. Together we needed to address *reciprocated* needs between the participants through mutual respect and agreement on actions regarding their views. We had to encourage *relevant* learning, which includes professional development and positive critical *reflecting* on actions happening in the classrooms and the action learning set. This underlines the importance that research must happen in a context so that local knowledge can help with the interpretation of results and the design of actions to understand the real life processes. Within this action research, the testing of knowledge happened within the action learning set by the participants. Where conventional researchers worry about objectivity, distance and controls, the action researchers worry about relevance, social change and validity, tested in action by the participants.

Herr and Anderson (2005) feel strongly about quality in action research and suggest five quality indicators: outcome validity, process, democratic engagement, catalytic validity, and dialogic validity.

*Outcome validity* is about the level to which actions resolve the initial question posed. In this research, the initial question was “*How can a PALAR approach assist FP teachers to implement inclusive education in the classroom?*” This evolves into lifelong learning of all the participants to have a vision, a plan, and a way to apply the plan. Outcome validity goes deeper than only reaching an outcome. It includes professional development, relationship building and sustainability of all. If the process was shallow or weak, it would be reflected in the outcomes.

The *process validity* is the level to which problems are framed and solved in a way that enables lifelong learning. This implies that we, as the participants, need to be confident that the findings are true by verifying it through triangulation (cf. 1.7.6).
Democratic engagement refers to the participants working equally and collaboratively together. We all engaged in the interactions throughout the different cycles of data collection to solve problems and overcome obstacles. We reflected on happenings, which ensured the quality of the process (Herr & Anderson, 2005; Neuman, 2011; May & Perry, 2011).

As the researcher, I ensured that the data sources were shared, as I wanted to accurately represent the eight participants’ ideas, perspectives and experiences (Stringer 2007; Mertler 2012, p. 132). I had to be cautious on how I presented and interpreted the data of the participants and not to reflect my values above theirs. Denzin (2009, p. 91) argues that “Representation is self-presentation,” meaning the other’s presence is directly connected to the researcher’s self-presence in the text. The “their” who is presented in the text should be a version of the researcher’s self. Josselson (2007, p. 548) refers to this as “changed ownership,” implying that what was once the story of the participant, has become the interpretation of the researcher.

Catalytic validity refers to the level to which the research process re-orients, focuses and energises participants towards knowing reality in order to transform it. In this research, I posed the question “Did the PALAR approach assist FP teachers to implement inclusive education in the classroom?” The participants were all part of a transformation process of self-understanding where their day-to-day view of reality and experience underwent transformation and re-orientation (Bailey, 2007; Herr & Anderson, 2005). This can contribute to a deeper understanding of the social reality in their lives (Herr & Anderson, 2005; Turesky & Gallagher, 2011).

4.6.2 Ethical considerations

In this research, ethical guidelines guarded against any possible harmful effects of research (Mertens, 2010). I abided by the ethical guidelines of the Ethics Committee of the North-West University, which include informed consent, transparency and privacy of the participants. The research was done in a participatory, collaborative manner where both the participants and the researcher had a valued opinion and a voice. Values are the basis of ethics, and will answer questions about what is right and what is wrong (Kylmä, Vehviläinen-Julkunen & Lähdevirta, 1999). Therefore, it is important that a safe and respectful environment had to be created where, in this research, the members of the action learning set could get fair treatment, and their privacy, anonymity and confidentiality could be protected (Chevalier & Buckles, 2013). No participant was forced to take part and this was made clear in both written and oral consensus (cf. Appendix A). It was also made clear that a participant could withdraw at any stage (Strydom, 2011). The school where the research was conducted, was contacted in advance to obtain permission from the principal for the research to be undertaken (cf. Appendix A).
4.7 SUMMARY

This chapter has given an account of the justification for using qualitative research within the epistemological and ontological paradigms. It has justified PALAR and its manifestation as a process that facilitates the emergence of knowledge that leads to the creation of scholarship of the participants. The chapter has further explained and discussed the data collection in the two phases and four cycles, as well as the data generation instruments used.

The next chapter will present the in-depth analysis of data from the cycles and action learning set meetings to arrive at a grounded theory that focuses on “How can a Participatory Action Learning and Action Research (PALAR) approach assist Foundation Phase teachers to implement inclusive education in the classroom?”
CHAPTER 5: DATA ANALYSIS AND DISCUSSION OF THE FINDINGS

5.1 INTRODUCTION

The purpose of the research, as discussed in chapter one, was to answer the question of “How can a PALAR approach assist Foundation Phase teachers to implement inclusive education in the classroom.” This chapter presents the analysis of the data generated from two phases and four cycles that pertain to the Participatory Action Learning and Action Research (PALAR) process. Phase one generated baseline data to be used in phase two by the participants in the action learning set to indicate what their current knowledge and their perception of their skills level of implementing inclusive education are. The participants then generated data through reflective diaries, observations, reflective learning questionnaires and purposeful discussions in the action learning set. During the analysis, I used triangulation because the outcome of the analysis depended on how different sets of data supported or contradicted the theoretical arguments.

Discussions from the phases and cycles are presented and supported by statements of the participants.

5.2 DATA GENERATING AND ANALYSIS PROCESS

The PALAR data generation and analysis process will be discussed in brief. See also sections 4.6.2 and 4.7 for more comprehensive discussions.

5.2.1 Data generating

The PALAR process was conducted in two phases and four cycles (cf. Table 5.1). Phase 1 involved the planning of the research in which PALAR was not used, for the reason that it only gathered baseline data through open-ended questions. Phase 2 consisted of four cycles, namely relationship building as a purpose to generate data, reflective diaries, participant observation, and open-ended questionnaires. It is important to remind the reader that, although relationship building formed cycle 1, in phase 2 it did not generate data to answer the research question. Its purpose was to activate the data-generation process. Data generated from the purposeful discussions was not transcribed as it reflected in the diaries in cycle 2.

5.2.2 Data-analysis process

The baseline open questionnaires of the 50 Foundation Phase teachers were collaboratively analysed in the action learning set meetings of the participants. The observations, reflective
diaries and r-learning questionnaires were analysed by myself and verified with the participants. The analyses were interpreted inductively, but the r-learning questionnaires (cf. 5.6) were interpreted deductively to arrive at the conclusion. Since the diaries became the participants' life journey (cf. 5.4.2), they made me promise to use only the applicable parts that aimed to answer the research question. The analysis of the reflective diaries was a challenging journey for me. The data seemed overwhelming at the beginning of the process. To get to a central storyline required reading and re-reading but, at the end, the process enabled me to get a sense of the whole before starting to systemise the data (Creswell, 2009). The data analysis involved identifying themes and categories made up from different ideas, opinions and belief patterns of the eight participants that can answer the research question (De Vos, 2005, p. 333). Quotations from the participants, in italic typeface, were assigned to the themes and attached meaning to the analysis.

Please see Chapter 4 for a more detailed discussion on the data analysis process.

The analysis of the data generated from the two phases and four cycles will now be discussed.

5.3 PHASE 1: DATA ANALYSIS

The purpose of the baseline data was explorative by nature to understand the problems Foundation Phase (FP) teachers face on a daily basis in the inclusive education classroom. It is important to mention that the data collected via open-ended questionnaires occurred during the first contact session before study material for the Learner Support and inclusive education was handed out to the in-service teachers. This means that the generated data was based on the teachers' prior knowledge on inclusive education (e.g. what is inclusive education, what do you understand under the concept) and prior skills (e.g. can the teacher apply theoretical knowledge to support a learner experiencing barriers to learning).

From the 50 teacher participants, only 34 completed the open-ended questionnaires because participation was voluntary. When analysing the data, I made use of direct quotations in italic typeface from the participants to substantiate the themes. The abbreviation FPt refers to Foundation Phase teacher and, as indicated below, how they responded on specific themes:

- “Some”: refers to between five and ten participants;
- “Many”: refers to between eleven and twenty participants; and
- “Most”: refers to twenty-one up to thirty-four participants.
The baseline data were analysed by all the participants in the action learning set for the following reasons: (i) to involve them in the research process, (ii) to develop ownership of the research project, and (iii) to establish a relationship of trust amongst all participants.

Phase 1 of the research was guided by the first three secondary questions of the research (cf. Table 5.2).

5.3.1 Baseline data

Below is a summarised outline of the themes and categories.

Table 5.1: Themes and categories of phase one, baseline data

<table>
<thead>
<tr>
<th>Theme:</th>
<th>Categories:</th>
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<tbody>
<tr>
<td>5.3.1.1. Understanding inclusive education</td>
<td>Conceptualising inclusive education</td>
</tr>
<tr>
<td>5.3.1.2. Perception of skills to implement inclusive education</td>
<td>Learning support in inclusive education</td>
</tr>
<tr>
<td></td>
<td>Participants' knowledge and skills level of implementing inclusive education</td>
</tr>
</tbody>
</table>

5.3.1.1 Understanding inclusive education

The following are some answers from the 50 FP participants who took part in collecting the baseline data about their knowledge and understanding of inclusive education:

“Inclusive education is the education of disability learners, learners who are disable they are in inclusive education because they need special attention” (FPt 2).

“To help each and every learner, with learning barriers to cater for learners with special needs” (FPt 3).

“….all learners are in one class, not like in the past where there was remedial learners alone in one class. All learners are in one class capable and those who are having problem” (FPt 22).

It appears that the participants believe that “all learners” need to be included and must be accommodated in one classroom. It is however noteworthy that the participants used terminology like disability, disable, learning barriers, and remedial learners, all influenced by the medical model (Swart & Pettipher, 2011b) (cf. 2.2.1.1).

Three of the participants’ asserted that “Learners are from different home backgrounds so as their [E]educator I had to teach them to respect others cultures and to demonstrate their cultures in the classroom” (FPt 4).
On a similar note, some participants pointed out that inclusive education is “Education whereby you include the child's learning holistically i.e. the child's cognitive, emotional, physical, visual, auditory, impairments in learning so to learn and assist the child in teaching and learning” (FPt 8).

5.3.1.2 Perception of skills to implement inclusive education

This theme focused on how the participants perceived their own skills to implement inclusive education and learning support by accommodating diverse learning needs in the classroom and addressing barriers to learning. Three of the 34 participants indicated that they were not clear on how to implement inclusive education in the classroom, therefore could not answer category two of the questionnaire (cf. Appendix A1). Most of the participants pointed out that they would group learners according to their abilities. Some said that they will “Pair the particular learners with a more gifted learner: (FPt 14). Some participants remarked that they would “Give extra time” (FPt 6) or “Give them extra work” or “Work extra with them” (FPt 15) for learners struggling with schoolwork.

Some participants indicated that they need a specialist's help in assisting learners with difficulties “help me to assist the learner” (FPt 7). Other participants pointed out that they would involve the parents in assisting the learner and one teacher talked about involving the SMT (school management team). Two participants mentioned a learner-centred approach (cf. 2.3.1) to enhance inclusive teaching: “I differentiated my teaching method during planning stage because teacher will have been informed by the learner's pre-performance of a specific task / activity - now teacher will know the level of a certain learner (s) and prepare for them different work” (FPt 12) (cf. 2.3.1). Another participant said: “I give my slow learners their own work design activities for their own level” (FPt 22).

5.4 PHASE 2: DATA ANALYSIS

Phase 2 of this research took place at a primary school in a rural area outside a small town in the Free State Province. This school had the most teachers enrolled in the ACE programme, namely eight FP teachers (henceforth called participants (P) formed the action learning set that generated data through four cycles.

Although the participants were enrolled in the ACE programme, I felt it necessary to ask them to read through the study material, not as students but as teachers in the inclusive classroom, to critique the material and measure their hands-on classroom experience against the study material. This helped us in the action learning set to form an opinion of the applicability of the study material in a day-to-day inclusive education classroom and to identify possible shortfalls in the study material. The significance for me, as lecturer and participant, was to experience the
reality of an inclusive education context through the eyes of students who are at the same time practitioners. This enabled me to evaluate the Learner Support study material of the ACE programme in a real-life context, the classroom as well as external factors that impact on the learning of learners. (cf. 4.6.4). One participant (P) reflected on the external factors by saying: “The children encourage me. I live with them in the same community – poverty, abuse, alcohol, HIV & AIDS but they are in class and are grateful. They have a will and determination to try” (P5).

Cycles 2 and 3 of reflective diaries and observations respectively, addressed the following secondary questions:

- What support do teachers have and need in inclusive education?
- What are the challenges that FP teachers experience regarding the practical implementation of inclusive education?
- What are the needs of FP teachers with regard to the training of inclusive education and learner support?
- What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?

5.4.1 Phase 2: Cycle 2 Reflective diaries

As indicated before, the cycles were not rigid and the purposeful discussions and observations were on-going and continuous processes that took place throughout all the cycles of data generation (cf. 4.6.2). I structured the data under cycles to streamline the analysis and discussions. The data obtained in phase two was collected over a period of six months. In this period, each participant had the opportunity to compile a reflective diary. The main function of the diaries was to record How a PALAR approach can assist FP teachers to implement inclusive education in the classroom and, in the process, develop a scholarship of teaching and learning. The diaries gave each participant the opportunity to voice their thoughts on aspects taking place in their classrooms and in the action learning set. I asked the participants to write their thoughts and opinions on inclusive education in a meaningful and reflective way as measured against the study material used for the ACE programme in Learner Support. They were requested to have a professional discussion amongst themselves, not as students but as teachers, and evaluate whether the study material is suitable to enable them apply inclusive education practices.

When referring to the 8 participants, the following will serve as clarification:
• “Some”: refers to 2 participants;
• “Many”: refers to 3 to 5 participants; and
• “Most”: refers to 6 up to 8 participants.

The participants completed their reflective diaries in either Afrikaans or English and from time to time made use of code switching to express their thoughts. With their consent, the Afrikaans diaries were translated to English for consistency in language usage in this research. The translations were verified with the participants to make sure their relevance was not lost.

From coding the reflective diaries, five themes were determined.

Table 5.2: Themes and categories of reflective diaries

<table>
<thead>
<tr>
<th>Theme</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.4.1.1 Value of the reflective diaries</td>
<td>5.4.1.1.1 Reflection on personal experience with keeping a diary 5.4.1.1.2 Reflection on the self as a teacher</td>
</tr>
<tr>
<td>5.4.1.2 Reflections influenced by South African policies on inclusive education</td>
<td>5.4.1.2.1 All learners can learn and need support 5.4.1.2.2 Inadequate training and support 5.4.1.2.3 A flexible curriculum 5.4.1.2.4 Including learners with disabilities into the mainstream (Please note that this is a verbatim report of the terminology the participants used and do not necessarily reflect the recommended and more appropriate terminology)</td>
</tr>
<tr>
<td>5.4.1.3 Value of the Screening Identification Assessment and Support (SIAS) document</td>
<td>5.4.1.3.1 The benefit of the SIAS as a tool to implement inclusive education</td>
</tr>
<tr>
<td>5.4.1.4 Value of the ACE programme</td>
<td>Multilevel teaching Different learning and teaching styles Turning point Source of knowledge</td>
</tr>
</tbody>
</table>

Each category will be discussed under themes and supported with quotations by the participants.

5.4.1.1 Theme 1: Value of reflective diaries

On numerous occasions (during the purposeful discussions and observational visits) the participants mentioned the value of keeping reflective diaries. This allowed them to critically
contemplate their own practices. It is important to note here that my personal reflections were not expressed in the same way as the participants, since I am not exposed to an inclusive classroom in a school. My reflections, with field notes, were rather on what I experienced during my observations in the classrooms of the participants.

The idea of reflecting diaries were new to all the participants. Therefore, it took them a while to write about their own thinking and to express issues in the form of a narrative diary. As indicated above, none of us anticipated the value the diaries would hold for our professional development; therefore, I felt it necessary to give an overall view of the impact of the diaries

During coding of the data gained from the reflective diaries, the following themes arose:

Table 5.3: Categories on the value of reflective diaries

<table>
<thead>
<tr>
<th>Categories:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.4.1.1.1 Reflection on personal experience by keeping a diary</td>
</tr>
<tr>
<td>5.4.1.1.2 Reflection on the self as a teacher</td>
</tr>
</tbody>
</table>

5.4.1.1.1 Category: Reflection on personal experience by keeping a diary

Some participants commented in their diaries on their fear to expose themselves: “My reflected journey makes me ashamed. I was struggling with the idea if I must write it and expose myself, but then realized we are a team and I owe it to the rest of the group” (P1). Another participant indicated that “My reflection journey was a wonderful experience. For the first time I listened to myself and how I complain about almost everything. I am going to do something about it. I must be a pain!!! (sic) But I first want to complain about this WP6” (P8). Participants 6 and 7 decided to work together and said: “Our reflection journey gave us an opportunity to work as a team. We decided to give the part you can use back in the form of a summary of the ALS’s [action learning set] inputs.” However, one participant did not feel ready to share her whole diary and allowed me to use only some of her reflections. In the diary she explained why she felt like this and committed herself to “I will get there and then make a copy for each to read. I will also include a box tissue” (P4).

5.4.1.1.2 Category: Reflection on the self as a teacher

The participants referred to the diaries as personal journeys of professional growth and development: “I could see how I developed professionally” (P 1). Another one said, “In my reflective journey, I learned so much about myself and I could see how I developed professionally. A lot is because of the interaction with the other teachers in the action learning
set. I really met some mentors, and the strange thing is, they were always only a few classes away but I was not aware” (P2).

One participant responded with the following: “When I start to reflect about my teaching, my life, why I am teaching in this rural area school full of poverty, abuse and alcohol, I started to think……everything in life has a purpose. I am here because of something. I decided I want to make a difference and I am going to start in my class with that child that the world and me judged as a lost case [cause]” (P4).”

From the analysis of the reflective diaries, it was evident that most participants experienced tension in their teaching: “My reflected journey is full of “ups” and “downs”. Can I teach 40 Foundation Phase learners in one class? – Yes I can. Can I meet all their needs? No it is impossible. Through my reflection journey I came to realize that I only teach for the middle group. There is no time to help the child with problems and the strong child does not get enough stimulation and challenges” (P5). Similarly someone wrote: “As teachers we strive to make “school” a place of safety and where learners can develop. As a teacher I try to meet each of the learners’ special individual needs. For the Department, I have paper work, planning, admin, filing, and fundraising to do. What is left for my “calling?” I do not have a choice. My challenges to “fulfill” my calling are reality I face every day” (P5). She further mentioned that “Through this reflection journey, I again remind myself that I will make the most of every day. I will take every lesson and use every teaching skill I acquired in the last 20 years of teaching and do the best I can. It is my reality” (P5). The following quotation further supports the trend of the previous reflections: “I know that my opinion is not going to change the education system in South Africa,……. [B] but as a teacher I will keep on trying to make a difference in my classroom. I will try to meet the needs of the learners in my class. I will keep on enriching and empower myself with knowledge to become a better teacher” (P 6). (cf. 6.10).

Another key issue that became evident from the diaries was the realisation that they need to interact with colleagues to learn from each other as teachers: “I learned a lot because of the interaction with the other teachers in the action learning set. I really met some mentors, and the strange thing is, they were always only a few classes away but I was not aware” (P 2).

### 5.4.1.2 Theme 2: Reflections influenced by South African policies on inclusive education

Many participants based their reflections of inclusive education as influenced by South African policies under the following themes:
### Table 5.4: Summarised outline of the themes from the WP6

<table>
<thead>
<tr>
<th>Categories:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.4.1.2.1 All learners can learn and need support</td>
</tr>
<tr>
<td>5.4.1.2.2 Inadequate training and support</td>
</tr>
<tr>
<td>5.4.1.2.3 A flexible curriculum</td>
</tr>
<tr>
<td>5.4.1.2.4 Including learners with disabilities in the mainstream (Please note that this is a verbatim report of the terminology the participants used and does not necessarily reflect the recommended and more appropriate terminology)</td>
</tr>
</tbody>
</table>

**5.4.1.2.1 Category: All learners can learn and need support**

Although most participants felt that it “is true” that all learners can learn and need support, they believe that not all learners can be accommodated in mainstream classrooms and will have better support in a special school. The following quotations capture the essence of this belief:

“...you can help the learners with reading difficulties during break or after school (what time????? in the day?????) and perhaps minimize that barrier….but what about the barriers you cannot minimize” (P5).

“From my experience I know that children with special needs will not be respected even teachers act and react differently towards them. Not all teachers have the calling to, or know how, to help learners with disabilities” (P8).

“Barriers like Spina Bifida. The learner struggles with all perceptual skills, with number concepts and any basic mathematical operation. He will never be able to do what the rest of the class in mainstream can do (P5).” Another participant affirmed this by saying “does mainstreaming include learners with cerebral palsy and physically disabled learners? I cannot see and understand how they want to accommodate these learners in mainstream schools. Apart from the facilities to be adjusted (ramps are easy to install – everything cost money!!) think about the bathroom facilities, catheterization, change of nappies. These can be done, if we have help. Think about the physiotherapist that must make sure contractions do not form in the hands of a Hemiplegic child. An occupational therapist that must help the Spastic Cerebral Palsied child with all the perceptual milestones he could not experience because of his disability. What about the psychologist that must help the muscular dystrophy child to accept that he has a short life expectancy” (P6).

A further response by participants who agreed that including all learners in one class was impractical, included the following: “[but] children with special needs need specialised teachers
to fulfil their needs and help with their barriers by individual attention and an adapted curriculum. Work need to be explained continuously and repeatedly [since] most of the learners have a slow work rate [pace], they need assistant teachers” (P8).

Regarding learners with infectious diseases the participants reacted by saying that “we all need to be respected no matter who or what…..but how can the health of the other learners be put at risk if one learner has an infectious TB[Tiber qulose]? What about the respect of the health of the rest of the class and the teacher? What about respect for the little girl sitting next to the “outjie” [boy] in Gr 3 but who failed every grade and was promoted every year?” (P5).

5.4.1.2.2 Category: Inadequate training and support

The feelings of being inadequately trained and, additionally, receiving insufficient support from the Department of Basic Education seem to be a crucial concern for the participants. The following quotations are evident of their frustration:

“[T]eachers need professional training in special needs education this will help to notice warning signs in advance” (P4). (cf. 2.7)

“There is no adapted Curriculum for Special Needs Learner (P5).” Participant 3 added “The policy documents state that the curriculum should be adapted for these learners, but it is not and no training is given on how to do this.” The participants also expressed the following: “There is no real training done. When there is training, facilitators from the Department just tell us to do it. No practical support is given. I think they do not have the know-how” (P5).

Most participants proclaimed: “[T]eachers are expected to do Curriculum differentiation, which entails multilevel teaching, differentiating teaching methods and catering for different learning styles but are not trained to do it” (P2). It was noted that most participants revealed feelings of “incompetence”, “hopelessness” and “frustration”, as well as “[I] feel overwhelmed and do not know where to start” (P8) because of a lack of, as they call it, “in-service professional development programmes”.

5.4.1.2.3 Category: A flexible curriculum

Participant 2’s expression on a flexible curriculum summarised all the participants’ views: “I do not want to hear the word FLEXIBILITY of the curriculum!!!!! How do we FLEX assessment if the 6 different groups in one class must write ANA’s [Annual National Assessment] in September and half of the class cannot read or write decent[ly]??? The White Paper [EWP6] says flex, but we get one ANA question paper, it’s like Chinese clothes, one size fit all!! How is that for flex?? Do you know what we do?? We train the learners like for a school concert [Ons
Participant 3 affirmed that “Some learners are not able to do any of the curriculum work. They have an average of 17% [summative assessment] but the system forces progress with support, to the next grade. In the next grade, the teacher does not find time to catch up what he missed [in the previous year] and he is expected to go on with the new grade's work. This causes a huge problem, which snowballs every year as new learners are just sent on to the next grade. Therefore, Education in South Africa as a whole is in crisis now” (P3).

Another obstacle that makes the application of a flexible curriculum very difficult is large classroom numbers. Most participants voiced their frustration about the large classroom numbers: “It is just unfair to expect that the teacher with 40 learners in her class can try new methods to reach that specific learner...” (P5).

The large classroom numbers contribute to participants protesting that they are not able to implement inclusive education successfully, since it is very difficult to address the range of diverse needs in such a class: “I keep on asking, “what about the other 4 with reading difficulties and the 6 with ADHD and the 7 who already finished their work???” (P5). (cf. 2.3.1).

The diversity of needs also makes it difficult for the participants to do learner-centered teaching. The following remark of participant 5 echoed the overwhelming feelings from most participants on learner-centred learning: “Wonderful!!!! It is the wish and goal of every “real” teacher who wants to help each learner reach his/her full potential.” “...the use of 4-5 different methods in one lesson is impossible. No structure or system can accommodate the wide range of barriers the learners have. Some learners will be left out!!!”

“This is a challenging task! and certain things need to be in place. Learner centered teaching has to do with new strategies and methods to accommodate the lot of diverse learners like

- Adapted curriculum goals;
- required and expected outcome changes;
- specialised teaching-methods, material, and resources;
- assistive devices;
- changes to the physical environment;
- each learner must have an individualised education plan (IEP)
- we must know about the SIAS document – I saw it in your study material.
Do (sic) the department know this? Do they know about the effort and involvement we must put in to meet the needs of all learners, the feeling will daunt you man!!!(P8).

5.4.1.2.4 Category: Including learners with disabilities in the mainstream

Most participants commented on the fact that they are not only confronted with the barriers that learners experience in the classroom, but also the barriers outside the classroom that impact on their learners’ academic progress. They mentioned “illiterate parents”, “poverty”, “substance and human abuse”. The participants are well informed about the society in which the school is located since they live there themselves. One participant stated that “in a perfect world all learners will be stimulated at home and be educated in the norms and values that will make our world a better place......But come and live in my community and you will see what is real” (P5).

Most of the participants declared their opinions about including learners with disabilities as follows: “The teacher will have to adapt all her lessons in such a way to reach every learner on his or her level. This would have been amazing. But who can expect that of a teacher with 40 different learners in the class and without any form of assistance???” (P5). On the same note, the following view was popular amongst the participants: “there is no place for a slow pace in mainstream” (P8).

The following response summarised most participants’ views on including learners with disabilities in mainstream schools: “an average mainstream school cannot handle it [inclusive education]. Teachers are rushing to get through the curriculum with the mainstream learners......Will all learners in mainstream schools be willing to accommodate these learners? My experience proofs the opposite!” (P8).

A few participants mentioned that if the “weighting” system, where each disability carries a specific weight, can be applied then maybe it could work: “an autistic child carries a weighting of 6. If the ratio of educators to learners is 1:30 and the class had 1 autistic learner then the class size would be 24” (P6 & 7). “But this is not happening” (P8).

Most participants felt strongly about special classes attached to mainstream classes: “....seriously worried about IE at this stage because learners cannot benefit from special education because there is not enough space in the special classes and our school is a full service school on the books with no special class (P1; 4; 5). Learners are identified to attend special classes or schools [but] sit in mainstream classes waiting for ELSEN numbers for up to three years” (P2; 6; 7). It appeared as if the participants are concerned about the future of the learners with special educational needs (SEN) and felt they have a “lonely fight with their hands tied behind their backs” (P 3).
However, participants still felt responsible for the learners who need support, since “…they just fall further behind” (P8). “I use the CAPS textbooks to develop learning material to suit the barriers in my class. It is very frustrating because I know next year I need to do it all over again, because every year there [are] is new challenges and new barriers in the classroom” (P5).

5.4.1.3 Theme 3: The Screening Identification Assessment and Support (SIAS) document

As indicated in paragraph 2.3.3, the national Strategy on Screening, Identification, Assessment, and Support (SIAS) was introduced in 2008 and a redraft document was published in 2014 to incorporate curriculum changes in the CAPS. The revised document forms part of the CAPS orientation programme for teachers and education officials in the different provinces (DBE, 2011). However, it appears as if the participants were not well informed about the SIAS document as participant 8 indicated, “I saw it in your study material.” (cf. 5.4.3.5).

The participants were exposed to the SIAS document through the ACE study material and were trained on how to understand and use it.

The following category derived from the data:

<table>
<thead>
<tr>
<th>Table 5.5: Category with regard to the SIAS document</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category:</strong></td>
</tr>
<tr>
<td>5.4.1.3.1 The benefit of the SIAS as a tool to implement inclusive education</td>
</tr>
</tbody>
</table>

5.4.1.3.1 Category: The benefit of the SIAS as a tool to implement inclusive education

The responses from the participants regarding the SIAS document were very positive: “The SIAS document helped me a lot. If I page through my reflections and see how I time-after-time refer to the SIAS document as a tool to help me to become aware of the contextual influences of a child and the impact it has on children” (P1).

Another participant added: “For me to become aware of how to complete the document is wonderful. I can become aware of what is happening in some of the households of children. I think it must be compulsory [as] from Gr R onwards” (P2).

Participants 6 and 7 saw the SIAS as a helpful tool to “involve parents” in the school, which is one of the key goals of the document (DBE, 2008). The following quote highlighted the significance of parental participation:
“[Individual Education Programmes] IEP should form the basis of lesson planning for each learner’s achievement. We need to make a lot of effort with these documents so that the parents can understand it and see the progress or not of their child. If the children then really need to attend a Special school, we think that the parents will be more willing.”

One participant specifically referred to being made more aware of emotional problems learners can experience: “Through this document [SIAS], my eyes were opened for the amount of emotional problems that children have under our noses. Emotional problems are one of the biggest origins of learning disabilities” (P2).

5.4.1.4 Theme 4: The value of the ACE programme

I did not expect the participants to reflect on the value of the ACE programme, but the participants spontaneously indicated their appreciation of the programme. As the participants worked through the ACE Learner Support study material, they mentioned in their diaries that they had become aware of different barriers to learning, the characteristics thereof and how to give support. One participant said: “While working through the ACE study material, I came to realize that he [a learner in her classroom] has ADHD and I need to help him” (P1). Another participant expressed that “....I was [also] not aware that we have autistic learners in Foundation Phase, until I read in the study material about characteristics and accommodation of the disability” (P6 and 7).

The following quotations from participants refer to the aspects of the ACE programme they learned about and believe to be valuable for them as teachers:

- “Multilevel teaching helps me to divide the class in different performance and pace groups” (P2).

- “Different learning and teaching styles” (P3).

- “The ACE study material was a kind of a turning point in the action learning set’s [ALS’s] perspective of the life of our learner’s outside of the classroom. We never thought of them coming from a bio-ecological environment that influences them to become the learners we need to deal with in the class” (P6 & 7).

- “This ACE study material and the action learning set were beneficial to me. When I see the large number of learners in our school with various challenges and I see how desperately they need support, I realise that you need to gain as much knowledge as possible. I therefore grab every opportunity to broaden my knowledgebase (sic) to help the learners in my class and the school as a whole” (P3).
5.4.2 Discussion of findings of phase 2 cycle 1: reflective diaries

In this research, the participants were exposed, for the first time, to keeping a reflective dairy about their teaching. This had value for both professional and self-development of the participants, as well as for an in-depth generating qualitative data method. Through the reflective diaries, the participants were confronted with their own actions, attitudes, knowledge, realities and values taking place in their own inclusive classroom. The participants did not read about barriers occurring in a general inclusive classroom in a textbook, but rather learnt about their own challenges from their own experiences, which underlined the complexity of inclusive education which Stakes (2003, p. 140) refers to as happenings "within its own world."

Through their reflections, the participants discovered themselves through their own voice and eyes. Hammersley and Gomm (2000, p. 3) affirm that participants need to be “given a voice, rather to use them as respondents or even as informants.” Without a conscious decision, the participants reflected not only on their teaching actions in the class, but also on their emotions. This is of benefit for deep understanding and meaningful context-bound data generation. In an interview or questionnaire, this information is not generally obtained (Wicks, Reason & Bradbury, 2008). Since the participants were writing their thoughts and experiences over a period of 6 months, they could step back from their actions and critically reflect on them. They could identify forms of thoughts that repeat itself over time and then critically reflect on the events. In this research, the latter happened individually or in collaboration during the action learning set meetings where they addressed these issues and tried to solve them. Therefore, through reflections, the participants could think about aspects in their classroom and about themselves to address these issues as they developed professionally.

Although the participants asserted that all learners can learn, it appeared that they felt strongly that learners who experience barriers to learning, especially learners who have some kind of disability or illness (“special needs”), should rather receive support in a specialised environment. They also continually used labelling terminology, such as disability, disable, special needs, and remedial learners (Hart, 1996; DoE, 1997; Florian, 2007; Pather, 2011) (cf. 5.3.1.1). Several research studies (e.g. DoE, 2001; Clough & Corbett, 2000; Engelbrecht, Green, Naicker, & Engelbrecht, 2003; Crous, 2004; Engelbrecht & Green, 2007; Swart & Oswald, 2008; Winter & O’Rawl, 2010; Swart & Pettipher, 2011a) confirm that internationally, including South Africa, mainstream teachers believe that quality education is a human right for all learners, comprising those experiencing barriers to learning, but that they are not able to accommodate them in their classes.

It is the general belief of the participants that more expert people (specially trained to teach and support learners who experience barriers to learning) in the specialised environment will benefit
these learners more than remaining in the mainstream classroom. These beliefs represent the medical model (cf. 2.2.1.1) where the focus is on “fixing” the child, because the problem is regarded as “within-child”. In this model categorisation and remediation by expert support staff in a special education setting were considered as the best option for learners who have disabilities (Nel, 2013; Swart & Pettipher, 2011a).

This is contradictory to an inclusive education approach, which emphasises that the education system should ensure the participation of all learners and end their exclusion from curricula, cultures and communities of local schools (Ainscow & Miles as cited in Nel, 2013). Inclusive education further focuses on transforming school cultures and pedagogy, to enhance understanding and acceptance of learners coming from different social societies and systems (Klibthong, 2012). A key reason for these “exclusionary” feelings of the participants can most probably be inadequate training. Thus, these findings need to be explicitly addressed in a teacher education programme focusing on learner support. This can be done by encouraging students to critically analyse and debate the theoretical and philosophical foundation of inclusive education, compare it with opposite approaches and then evaluate how to ensure best practices to enact inclusive education.

All the participants in this research affirmed that they are not sufficiently trained and therefore they deem themselves unable to teach and support learners with “special needs”. Consequently, they decided to improve their knowledge and skills by enrolling in the ACE Learner Support programme. EWP6 describes the teacher as the primary source for achieving the goal of an inclusive education and training system (2001, p. 18). However, this statement requires that teachers be thoroughly trained. Being well trained enables teachers and furnishes them with an enhanced level of competency to effect inclusive education. Pedagogical knowledge of how to identify and address barriers to learning by differentiating the curriculum, assessment, and classroom methodologies is essential in the inclusive classroom (Geldenhuys & Wevers, 2013) (cf. 2.3.1). Yet, limited competency as mentioned before is one of the greatest barriers to the effective implementation of inclusion, and was evident from the findings. The participants in general seemed to feel incompetent to deal with inclusion, diversity, behaviour problems and disabilities in the complex and diverse South African schooling society. The inadequacy of training to meet the needs of all the learners in the classrooms can result into a wrong and negative perception of others about teachers in general: teachers can be labelled as lazy and not trustworthy. These labels make them feel powerless, resulting in a lack of self-respect, self-assurance, motivation and enthusiasm (Prinsloo, 2001) which could have a negative impact on their teaching in general (Swart, Engelbrecht, Eloff & Pettipher, 2002; Subban & Sharma, 2005) (cf. 2.5.1). This is confirmed by several other studies; therefore,
inadequate training seems like an international concern (Forlin, 2008; Savolainen, et al., 2011; DHET, 2011; Nel et al., 2013) (cf. 2.5.1).

EWP6 (SA, 2001) asserts that a flexible curriculum is a core feature of inclusive education. Nevertheless, this seems to be a particular frustration for the participants. Reasons given for not being able to apply a flexible curriculum included the following: the emphasis on learners passing the ANAs (Annual Assessments); learners being passed on to the next grade without fully achieving the requirements for the current grade; overcrowded classrooms; and the range of diverse needs in one classroom. The participants’ feelings over these obstacles to apply a flexible curriculum are reflected in several studies as being central in preventing classrooms to become fully inclusive (Trostle Brand, Favazza & Dalton 2012; Nel et al., 2013; Swanepoel, 2013). For several years the purpose and benefits of the ANAs have been a contentious issue in education circles (Mare, 2015; Marais, 2015). Based on the DBE policies pertaining to assessment (DBE, 2013; DBE, 2012) learners may not remain more than four years in a phase. Consequently, the participants experience the frustration of learners being promoted to a next grade without achieving all the requirements of the current grade (Trostle Brand, Favazza & Dalton 2012; Nel et al., 2013; Swanepoel, 2013) (cf. 2.4.6). Overcrowded classrooms, together with a wide range of diverse learning needs, have been reported in several studies to be a critical barrier for teachers being unable to implement inclusive education successfully (Subban & Sharma, 2005; Bourke, 2010; Engelbrecht, et al., 2015).

Despite feeling frustrated by the above-mentioned barriers, the participants in this research still felt a responsibility to support learners who experience barriers to learning. Yet, even though they acknowledge that learner-centred teaching, as well as adaptive methods of teaching and assessment (Vayrynen, 2003; Loreman, 2007) (cf. 2.3.1; 2.3.2) should be employed in an inclusive classroom, they indicated that it is very difficult to achieve, the reasons being the obstacles as mentioned earlier in this paragraph. They stated that they employ group work and extra time as supportive measures (cf. 5.3.1.2). However, Elliot and Marquart (2004) as well as Alant and Casey (2005) indicate that allowing extra time is not necessarily suitable for addressing barriers to learning—the purpose is rather to address the barrier than to compensate for it. It is, consequently, obvious that a teacher education programme for learner support should take the above-mentioned barriers into consideration in order to provide teachers with the required knowledge and skills to deal with them in practice in an inclusive manner.

From the findings, it was evident that the participants are well informed about the contextual influences on their learners, since they are living in the same society where the school is located (cf. 5.4.2.2; 5.4.4.1). In the SIAS document, as taught in the ACE programme, they saw the
emphasis it placed on the impact of contextual factors on a learner experiencing barriers to learning (Ainscow & Cesar 2006; DBE, 2008; Reindal, 2008; Swart & Pettipher, 2011a) (5.4.4.1). The SIAS document seemed to provide them with an instrument on how to detect a learner who experiences barriers to learning early; complete learner and diagnostic profiles; ascertain support needs; and compile individual support plans (ISP). The guidelines for the requesting and provisioning of additional support and monitoring of support in the document (DBE, 2014; Geldenhuys & Wevers, 2013) (cf. 5.4.3.4; 5.4.4.1) also provided strategies for a learner who needed more specialised support. The participants specifically mentioned that it helps them to gather relevant and important information from parents, but also strengthened their position to encourage parents to place their children in special education. It appears, therefore, that teachers are in need of a practical tool when it comes to the identification and support of a learner who experiences barriers to learning. However, in a teacher education programme for learner support care should be taken in making students aware that the SIAS should not be used as a practice to exclude learners from mainstream education (Kurth, Morningstar & Kozleski, 2014).

During this cycle it constantly became evident (as noted in my field notes) that the participants began to collaboratively criticise and reflect on their Learner Support study material (cf. 5.6.1.1) and how it is relevant for their practice in their classrooms.

“In the ACE, you teach us theory and not reality. What you teach us in ACE is not how it is out there [in the classroom]...” (P4).

“...but we sit with heaps of theory & definitions but we need practice... In theory, you only learn about the nice and the ideal” (P2).

Although the quotations and subsequent themes give the impression of negativity towards inclusive education, I did notice that they had begun a process of developing scholarly thoughts and actions by sharing insights, evaluating, and building on learning gained together (McKinney, 2012; Nel, et al., 2013) (cf. 5.6.1.3).

“...What about group work assignment [?]. Look how nice we learned from each other in the ALS [action learning set]. Students can work together on a case study as if they are a[n] ILST [institutional level support team] committee and look at from Bronfenbrenner up to a support programme” (P6).

“...I think we take all the negative things we talked about [purposeful discussions] that is not happening in the classroom and put together an assignment on that? Things like learner-centred approach; different learning styles; pace of learning; flexible teaching methods; multilevel” (P2).
We all started to question our beliefs, values and assumptions, and began to discover new perspectives of our own teaching and learning (cf. 5.4.2.1; 5.4.2.2) (cf. 4.5.4). This aligns with Mezirow (2009) as well as with Pegg, Reading and Williams (2007 as cited in Wood & Zuber-Skerritt, 2013) (cf. 3.5) who purport that scholarship develops once participants start to think about it, and consider their purpose and future regarding their work and life from different viewpoints.

The next part focuses on classroom observations that became an ongoing process in the research. It sketched a full picture of the contextual background of the research setting, helped me to understand how and why the participants teach the way they do, as well as to understand the needs and frustrations of the participants when voiced during the action learning set meetings. The observations further helped me to evaluate the value and shortfalls of the Learner Support study material.

5.5 PHASE 2: CYCLE 3 PARTICIPANT OBSERVATIONS

In this cycle, I observed the participants in their classrooms, which gave me the opportunity to develop an understanding of their classroom context. I experienced that the observations built a relationship of dialogue and trust (Angrosina & Perez, 2003) between us, which allowed me the opportunity to view their sincere actions in the classroom.

Table 5.6 gives a general summary of the Foundation phase classrooms, comprising Gr 1, 2 and 3, where the observations took place. There were supposed to be three classes in each Grade, but one Gr 1 teacher resigned and there was not a replacement. An assistant looked after the class but did not form part of the action learning set.
The learners in the school are mainly black Sesotho-speaking learners as well as Afrikaans-speaking coloured learners. The teachers are white or coloured and all of them speak Afrikaans as home language (cf. 2.4.74).

The following section will deal with the findings of the observations in the classrooms of the participants and informative conversations after the observations under the following themes:
5.5.1 Theme: Classroom management

5.5.1.1 Category: Discipline

The Grade 2 and 3 classes are generally well disciplined. One participant of a Grade 3 class said, “*I let the children work all the time that keeps them busy and disciplined.*” However, the Grade 1 learners tend to seek more attention. The moment the participant gives a learner a compliment, 4-5 learners come to her also asking for approval of their work. The teacher then kindly reprimanded them to get back to their chairs to avoid disciplinary challenges.

5.5.1.2 Category: Overcrowded classrooms

Most participants concurred that the large classroom numbers prevent them from providing adequate support (cf. 5.4.1.2). All the classes are cluttered with tables and schoolbags on the floor, which make it difficult for the participants to move between the learners. Consequently, they mostly stand in front of the classroom when teaching.

One participant of a Grade 1 class struggled to remember the names of the 50 learners in her class where only a few could already write their names. When she tried to affix their names to the learners’ tables, many of them removed it. To resolve the matter, she gave each learner a number but this meant they had to stay in their seats. If she wanted to call a learner, she had to count down the rows. As soon as the learners could write their names, she spoiled them with a “special” thick marker pen and coloured paper to write their names and affix it to the table. The learners took pride in their writing ability, became very protective over their names and only then did the names stay on the table.
5.5.1.3 Category: Group work

Participants in Grade 2 and 3 classes divided their classes into groups which seemed to help class discipline. The participants had a group leader in each group to report any form of disrespect towards weaker learners or learners who dominated the group. The one Grade 3 class was divided into seven different groups and six of the groups consisted of learners with mixed abilities, e.g. strong, middle and weak learners. The strong learners supported the weaker learners through a “buddy-system”. One participant said, “Mem, [sic] you know the problem with the buddy-system is the gap between the learners ability. The one is there [pointing up] and the other one in there [pointing down to the floor].” (P5). Every group had one or two “quiet” learners, meaning they cannot understand English. Some of the academically stronger learners translated work for them after completing their own work, but sometimes the quiet ones sat and drew pictures, waiting for the bell to ring for break. The participant felt she neglected these learners: “Mem [sic] what must I do? I feel terrible, but I must finish the curriculum” (P5). It was, however, noted that learners were eager to work; even learners who could not speak English gave answers in a choir with the rest of the class.

One of the groups in a Grade 3 class consisted of six learners. None in the group could read. When the participant read some work in English, she often stopped to explain words or asked learners to explain the words in their mother tongue to the ones who could not understand English. She tried to link the work to programmes on television and argued, “Their world is the television” (P4).

5.5.1.4 Category: Supporting learners in the classroom

During the observations it appeared that the participants tried their best to support the learners where needed, but the pace of the learners varied so much that they struggled to assist them individually. In general, the participants would give an activity to the whole class and once the class get started, they would then attend to learners who were not coping to give individual support. When the faster learners completed their work, they silently moved to specific learners who were not coping to give them support.

5.5.1.5 Category: Learners with special needs

One Grade 2 class has 18 repeaters and three are waiting for ELSEN numbers from the department. The ELSEN number is an indication that the learner has been tested by the district official, but has remained in the school, since the parents do not have sufficient funds to send the child to a special school outside town. The participant expressed her frustration by saying, “I passed my degree with distinctions at university but I was not trained for this. No book prepared
me for this. I need a mentor. If this is what teaching is about, students need practical experience what about a teaching Zuma year?" (P8).

In one Grade 1 class, a learner sat at the participant’s table and played with blocks. According to the participant, the learner does not have the “mental ability to cope in mainstream”. The school had applied for his ELSEN number at the department, but had not received any feedback yet. In the same class, the participant compiled a ‘special’ group of six learners, sitting on a carpet in front of the class under the black board. She stated that the learners needed to function separately from the rest because of disruptive behaviour. The group included children with foetal alcohol syndrome, intellectual disability, and one with a split palate who did not take part in conversations. One learner has an obese syndrome and another one sniffs glue. The learner with the intellectual disability has non-retentive faecal incontinence the moment he feels that things are not going his way.

During the conversations after the observations all the participants stressed that they believe that “IE has its place in the school system” since “there will always be different levels where children need help (P3)”. However, based on the challenges they were experiencing, they declared: “I would rather say that schools need special classes. Learners with special needs cannot cope in mainstream classes with a ratio of 1:50 FP learners. They need more attention, the pace is too fast and the teacher cannot attend to their needs – school work and emotional, Mem [sic] you can [mos] look around you and see for yourself, not so? [ne?]. These kids are left on the edge – nobody has time to really support them” (P 4).

They felt that “in those classes the learners can get more time, the pace is slower under a curriculum that cater[s] for their needs and [we] participants will feel better” (P7).

5.5.2 Theme: Implementing the curriculum

The participants acknowledge that the curriculum has inclusivity as a principle: “Mem [sic] you will see if it is [now] inclusive, NCS [or] CAPS or whatever, teaching must go on” (P5).

A general complaint during the observations was that there is a continuous change of curriculum policies, which adds to their administrative burden. However, they affirm that they need to continue teaching: “We only see new admin, then we know it’s [again] a new policy, but nothing change in the class, we must teach” (P2). (cf. 2.3.3).

The classes are overcrowded and thus restrict activities like story time on the carpet, having a reading corner, a display table, or the use of games to learn new concepts, all features that are supposed to be in an FP classroom (Brewer, 2007). One Grade 2 participant remarked: “They are still babies but the context force them to learn as intermediate children” (P1).
To apply curriculum differentiation appeared to be a mutual frustration for all participants because of (i) the diversity of learners, such as repeaters, learners with language, vision and emotional barriers in the classroom, and (ii) the pressure to complete the prescribed curriculum for the year.

Because of the diverse needs in the classroom some of the participants struggled to explain instructions of activities to ensure that all learners understood what they needed to do. In all the classes there is a large percentage of learners that find it difficult to complete the required tasks as prescribed by the curriculum.

As a result of the different learning levels of the learners in a class, assessment is a challenge and the participants asserted that it is one of their most difficult tasks. One Grade 3 participant implemented a strategy of teach-test-reteach-retest during one of the ANA preparation sessions. She contended that “This is my way of explaining a test to a class of 42 learners in which 11 cannot read at all, 15 can read but they cannot comprehend on their reading, and 16 can work independently. During a test between 18 or 20 will pass and the rest will fail. Mem, [sic] this is a given and a frustration. Then I ask you how do I assess?” (P2) (cf. 5.4.3.4).

5.5.3 Theme: Inadequate resources

The challenge of overcrowded classrooms and the shortage of learning material made it difficult for the participants to create a learner-centred classroom (cf. 5.4.3.4; 5.5.3; 2.4.3). The FP received new CAPS textbooks from the DBE, but mostly in Afrikaans and by far not enough for the all the learners. As a result the learners had to work in groups of three to share the textbooks. The books also stayed at school since, as one participant mentioned, “I [cannot] send text books home; it will never come back and you can see there are not enough” (P7).

The school received two different sets of mathematics and English Grade 2 CAPS textbooks with different content. If the participant asks the learners to open (for example) on page 110, she has to move around to find that specific exercise in the other set of books. The participants felt that the CAPS textbooks are not suited for the ability level of their learners. For example, the space allocated for activities in the Gr 1 book is too small or too narrow for some of the learner’s underdeveloped fine motor skills (cf. Appendix D) Participants further mentioned that there are many spelling mistakes, page numbers differ between books of the same set, there are calculation mistakes in the mathematics books and no calculation steps to show the learner how to get to an answer.

Since the school is a poverty-based quintile two school (cf. 2.4.4 & 4.6.1), they struggle financially and their resources, like paper and toner for the photocopy machine, are limited. The result is that the participants write all the work on the board and the learners must transfer the
work from the board into their exercise books. One participant voiced their overall frustration with the following: “What is the use of all these effort and money to write these CAPS books if we cannot use them?” (P5).

During my observations it was clear that the participants do their utmost best with the minimum resources to be the best teachers they can. They often have to use their own initiative and finances to obtain resources. The one participant cut A4 papers into small blocks and wrote numbers on them to teach the learners place values in mathematics (cf. Appendix D). In one Grade 1 class, the participant did not have a variety of coloured chalks for the blackboard. Consequently, when she wanted to use blue, for example, and she only has orange, she reminded the learners “children remember, today this colour (orange) is blue.” (P1).

5.5.4 Discussion of the findings of phase 2, cycle 3

Although maintaining discipline was difficult in the overcrowded, multi-diverse classrooms, the participants generally handled the so-called surface disciplinary problems (Levin & Nolan, 1996) satisfactorily. Surface behaviours are, as a rule, not the result of deep-seated personal problems, but normal developmental behaviour of children (Levin & Nolan, 1996). The reason for this could be that in the Foundation Phase learners remain with one teacher throughout the year. This allows the teacher to get to know the learners and their unique behaviours better as the academic year continues. Since the participants understand the context (community, home and culture) of these learners (cf. 5.4), it also contributes to their being able to address certain kinds of “misbehaviours”, such as constant demands of attention. Marais and Meier (2010) assert that when causes of disruptive behaviour and the system(s) in which they originate are understood, it becomes easier to deal with the learner. Nevertheless, the overcrowded classrooms (cf. 5.4.1.2; 5.5.1.2) make it very challenging to address individual needs and consequently the participants do many of their activities in groups. What is noteworthy is that these groups are usually divided into mixed abilities and a buddy system is used where the stronger learners help the weaker ones. Even though the participants do not consciously realise it, they are employing a form of cooperative learning that, according to Thousand and Villa (1999), is the most important instructional strategy that supports inclusive education.

In line with the South African Schools Act 84 of 1996 (SASA) which supplies the legislative framework for implementing an inclusive education system, the school provides access to learners from different socio-economic backgrounds, races, ethnical groups and languages, as well as disabilities (South African Constitution, section 9-(3), (4), and (5) and section 29(2)). This means that they have a diversity of learners in the classrooms. It was apparent from the observations and comments that the participants experience many daily challenges in their classrooms, seemingly because of this diversity, which made it difficult for them to become fully
functional inclusive classrooms, specifically, when there are learners who experience barriers to learning (”special needs”) in their classrooms. As in their diaries, the participants voiced their affirmation that ELSEN learners should rather be accommodated in separate classes to receive additional attention (cf. 5.4.3.1; 5.4.3.4). During my observations, the participants attempted to support learners who struggle during the completion of activities. However, the learners who are not coping because of their “special needs” were often not included in the activities that the rest of the class were doing, especially because of their behaviour problems. These learners are, therefore, still regarded as being different (Bantjes et al., 2015). Several studies have found this attitude to be the case in South African classrooms (e.g. Bantjes et al., 2015; Donohue & Bornman, 2015; Engelbrecht, Nel, Nel & Tlale, 2015).

As indicated in the participants’ diaries, they find that the demands of the curriculum are a critical barrier for them to be inclusive teachers. The continuous changing of curriculum policies result in confusion about what is expected (Similani, 2013). The pressure to complete the curriculum despite learners working at difference paces and then not being able to apply differentiation, was evident during my observation, and confirmed the frustration revealed in the participants’ diary entries about an inflexible curriculum. The diversity of different “learning levels” (as the participants called it), the overcrowded classrooms, the difficulty for some learners to complete assessment tasks and the anxieties surrounding the ANAs add to the participants’ apprehension about inclusive education. Added to these difficulties is the encumbrance of inadequate resources, such as limited stationery, as well as inappropriate and faulty learning material provided by the DBE. An integral aspect of inclusive education is that quality education must be provided to all learners. However, these systemic barriers could hamper the realisation of a quality education system (Sayed & Ahmed, 2015).

The findings, as reflected in the participants’ diaries, were confirmed by my observations. It was therefore evident that the participants struggle with a range of challenges, which makes it difficult for them to implement inclusive education. Because of these challenges, they decided to further their studies in order to help them deal with it. Yet, it seems that the theory they gained in the ACE Learning Support programme did not fully enable them in the classroom.

5.5.5 Adapting the study material of the ACE course in Learner Support

This part of the research was crucial in the process to transform the participants into scholars (cf. 3.3). After the data was gathered from the baseline data, the reflective diaries and the observations identified certain gaps that the study material did not address. Consequently, I and the participants in the action learning set met several times to discuss possible adaptations to the study material. This was done to not only develop scholars, but also deliver better inclusive teachers in practice.
The participants claimed that it was essential that extrinsic systemic barriers be addressed in this process. The following table summarises the barriers and provides suggestions on possible adaptations to the study material and the assignments in the ACE programme.

Table 5.8: Barriers and adaptations thereof in study material

<table>
<thead>
<tr>
<th>Extrinsic systemic barriers</th>
<th>Cross references to literature discussions and empirical findings relevant to the barrier</th>
<th>Other literature confirming the barrier</th>
<th>Suggested adaptations to study material</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overcrowded classrooms</td>
<td>cf. 2.4.3; 5.4.3.4; 5.5.3</td>
<td>De Lannoy and Hall, 2012; Subban and Sharma, 2005; Bourke, 2010</td>
<td>Classroom management (cf. 5.5.5 i)</td>
</tr>
<tr>
<td>Lack of resources</td>
<td>cf. 2.4; 2.4.2; 2.4.4; 2.4.8</td>
<td>DoE, 1997; Lomofsky and Lazarus, 2001; SA, 2001; DBE, 2011a; Prinsloo, 2011; Swart and Pettipher, 2011a</td>
<td>Discover resources outside the classroom (cf. 5.5.5 ii)</td>
</tr>
<tr>
<td>Wide range of diverse learners in one classroom</td>
<td>cf. 5.4.3.1; 5.4.3.5; 5.4.3.4</td>
<td>Bothma et al., 2000; Bornman and Rose, 2010; de Boera et al., 2011; Savolainen et al., 2011</td>
<td>Tracking progress (cf. 5.5.5 iii)</td>
</tr>
<tr>
<td>Socio-economic contextual influences</td>
<td>cf. 4.2.2; 5.4.4.2</td>
<td>DBE, 2008; DBE, 2011e; Prinsloo, 2011; Strydom, 2011; DBE, 2014; Donohue and Bornman, 2014; SAHRC, 2014; Swart and Pettipher, 2011a</td>
<td>Enrich the classroom atmosphere (cf. iv)</td>
</tr>
<tr>
<td>Lack of support from the DBE</td>
<td>cf. 2.3; 2.4.6; 2.4.8</td>
<td>DoE, 1997; Muthukrishna and Schoeman, 2000; Lomofsky and Lazarus, 2001; SA, 2001; Pottas, 2005; Schoeman, 2012; Geldenhuys and Wevers, 2013; Nel et al., 2013</td>
<td>Collaborate (cf. v)</td>
</tr>
<tr>
<td>Lack of training in inclusive education and learner support</td>
<td>cf. 2.3; 2.3.1; 2.4.8; 2.5.1</td>
<td>DoE, 1997; Lomofsky and Lazarus, 2001; SA, 2001; Florian, 2010; Slee, 2010; Prinsloo, 2011; Swart and Pettipher, 2011; Florian and Linklater, 2011</td>
<td>Suggestions (cf. vi)</td>
</tr>
</tbody>
</table>
5.5.5.1 Suggested adaptations to study material

As participants we had many purposeful discussions on identifying the shortfalls in the study material and assignments, and possible adaptations thereof. As summarised in Table 5.2, the following suggestions resulted under the different themes:

i) Overcrowded classrooms

From the discussions, it was evident that, although participants felt frustrated about the class sizes, there was agreement that we need to work around the barrier. However, this requires that in-service teachers need to have knowledge and skills with regard to the following to be able to handle and control overcrowded classrooms.

- Adapt classroom management

Since the classroom consists of diverse learners, the teacher needs to be informed of diverse learning styles, different temperaments and personalities of learners. The teacher consequently should know about the unique learning needs of learners to be able to accommodate them (Vaughn, Wanzek, & Denton, 2007). It was suggested that the teacher must try to put 10 minutes per day (or even only per week) aside to speak to either a small group of learners or individual learners to get to know them and their home circumstances better. If the teacher knows the learners, she will be able to know their abilities and capabilities (McDonnel, Hardman & McGuire, 2007). Knowing learners’ abilities in an overcrowded classroom can be a helpful tool to assign different responsibilities to different learners by which they take ownership of their own learning. Different leadership roles can also be assigned which makes the learner believe that the teacher regards him/her as someone who can achieve something in life (McDonnel,
The participants stressed that the bright learner is not necessarily the best leader, and that the study material must underline that.

The participants asserted that the groups must not be rigid during the year. From time to time the teacher must rearrange the groups by placing mixed-ability groups together, sometimes learners with the same-abilities and sometimes even gender groups. Group collaboration can expose learners to diversity and prevent preconceived ideas about learners who differ from others. Group work further improves life skills by learning to share things with others, waiting their turn to speak, listening to others and tolerating different personalities (UNESCO, 2005; Dee, 2007).

ii) Lack of resources

It was proposed that teachers need to learn how to discover and use resources outside the classroom.

The participants maintained that resources do not need to cost money. For example, the school grounds can serve as a resource. Learners can discover things like ownership of school grounds, by picking up papers, respecting the environment or taking responsibility for property not belonging to you. Different areas on the school grounds can serve as examples to demonstrate and explain mathematical concepts, like shapes or sizes.

The participants suggested that a teacher can encourage the learners to create resources. For example, in groups, the learners can create posters or make use of recycled materials, which can be displayed in the class. Some displays can even hang from the ceiling to create a cheerful atmosphere (Väyrynen, 2002; UNESCO, 2005).

The participants recommended that people from the community can also be utilised as resources. Talking about community members’ special skills and knowledge can reveal talents such as craftsmanship and artisanship. The participants also suggested that decent high school graduates from previous years could assist teachers in the classroom from time to time as assistants (UNESCO, 2005).

iii) Wide range of diverse learners in one classroom

A recommendation that was made is to track learners’ progress. For this they recommended that students are taught how to use a diagnostic assessment tool that can serve as a baseline assessment. This is done at the beginning of the year, as well as after the completion of every theme of the CAPS. This will give the teacher an overview of each learner’s knowledge and skills, as well as the possible barriers he/she is experiencing (Alonzo, Ketterlin-Geller & Tindal,
2007). In this sense, the teacher can reflect on her own teaching, and identify learners who need support so that she can accommodate them immediately. A critical need was how to employ group work effectively to accommodate learners who experience barriers to learning, as well as the stronger academic learners with more enriched work (Vaughn, Wanzek & Denton, 2007). They stressed that teachers must not regard group work as a means to avoid teaching altogether.

The participants further advised that suggestions for practical learner support activities needed to be built into the study material as well as indicators of how and where to place learners in the class who need extra help.

iv) **Socio-economic contextual influences**

Ideas for creating a welcoming classroom atmosphere were emphasised. The participants avowed that poor socio-economic circumstances cannot be controlled, but the soul of the learners does not need to be poor. It is important that teachers need to create a classroom atmosphere to ensure that all learners are and feel included. They need to feel secure and comfortable (Väyrynen, 2002). The participants proposed that humour and love for learners create a positive attitude and could be the biggest source for an inclusive atmosphere that a teacher can give to a learner.

v) **Lack of support from the department**

The participants regarded collaboration with and by the department as a pivotal solution to this barrier. The participants were honest about the lack of support from the department, but decided to work around it by supporting one another. They urged to emphasise strategies of collaboration between educators and other role players (e.g. the community, parents, etc.). It was suggested that colleagues from the same grade or phase must visit one another’s classrooms and give support by providing creative ideas to address the challenges in class. They even recommended that schools in the same town must liaise and build networks, and learn from one another by rotating resources or exchange samples of lesson plans or ideas to address barriers in class (Ainscow, 2007; Shepherd, Hasazi, 2007).

vi) **Lack of training in inclusive education and learner support**

The participants felt strongly that the study material must focus more on how to do lesson planning and implement creative ideas of teaching in a diverse classroom. If the teachers know how to plan a lesson, they will feel more in control of the class, have confidence in what they are doing which will also affect the learners positively. Lesson planning aligns with classroom management in the sense that the teacher needs to know her learners to be able to plan
accordingly and adapt her teaching to the learners’ learning styles and abilities (Vaughn, Wanzek & Denton, 2007). The participants felt that the curriculum needs to be relevant to the learner’s environment. This will result in the themes being more meaningful since the learners will be able to relate to it. They further asserted that teachers must be made aware from the beginning that their lessons must be planned to be inclusive. The participants consequently suggested an assignment where a lesson plan is designed and practiced for an inclusive classroom environment (Rose, & Howley, 2001; Rose, 2007).

The participants suggested that teachers must be able to identify, design and employ activities that can accommodate all ability levels, for example

- **group discussions**, where the learner with a language barrier can be heard and someone can translate to the rest of the group;

- **independent work**, in which every learner can be assessed on his or her level;

- **role-play** in which learners can have an opportunity to express themselves;

- **demonstrations** in which different learning styles can be accommodated.

They also asserted that teachers need to be encouraged to change assessment activities more creatively, especially in the manner in which these are marked, and they suggested a variety of activities such as word puzzles when writing spelling tests, short quizzes, problem-solving exercises, or even a homework task in which the family can take part.

The participants further advised that, before the teacher starts with the lesson, she could write the lesson outcomes on the board and then explain to the learners how it can be achieved in different ways. The learners would then know what she expects from them and can possibly form a picture of the goal towards which they are working.

They further felt that teachers needed to explain new concepts before using these in the lesson. She can write it on the board, so the learners can see it and then she can point to it when referring to the word. This will help the learner with a language barrier and could help with the flow of the lesson, as learner’s thoughts will not be disrupted.

The participants recommended that the study material must inform the teachers not to “over teach”. Learners can only concentrate for 10-15 minutes, after which they become bored, become sleepy and start talking among themselves. Therefore, the lessons must be planned in such a way that there are frequent activities such as asking questions, having a discussion or completing worksheets (Vaughn, Wanzek, & Denton, 2007).
The participants mentioned that the study material and (even more so) the assignments must motivate teachers to become creative in their thinking and teaching. They felt that creative activities will involve learners and more learning will take place.

vii) Curriculum barriers

“Teach to include” became an important slogan for the participants. They indicated that inclusive education must be emphasised as education policy and that we need to teach accordingly.

Suggestions on how to address curriculum barriers and making sure that inclusive principles are applied included the following:

- During classroom activities every learner must be given a chance to speak in class, irrespective of his or her language ability. If the class cannot understand, a learner in the class can perhaps translate the sentence.

- Properly plan a lesson and its relevant activities to accommodate learners who experience language barriers.

- The value of group work in an inclusive education system must be stressed as learners who experience barriers will feel more comfortable and secure amongst their peers (Väyrynen, 2002).

- Develop strategies to help teachers to plan their year, months and their weeks on how to complete the curriculum and make time to support learners.

- The also felt that teachers need to know how to rephrase important points, and how to summarise the lesson in the end. They advised that teachers could make use of learners to summarise the important points in different languages to accommodate learners with language barriers. Learners with language barriers will then hear the important points in their mother tongue.

- Encourage the use of real life examples where possible. This suggestion was partly for learners experiencing language barriers, as well as to accommodate different learning styles in one classroom (Väyrynen, 2002; UNESCO, 2005).

For learner-centred learning they made the following recommendations:

- After the teacher has presented a lesson, she must allow learners to discuss in groups what the essence of the lesson was and ask one learner per group to report back. Different
groups in the class can then give a mark but the mark must be motivated. At the end of the lesson, learners can have a class debate on the correct or the wrong answer. Another example was that learners individually or in groups get the opportunity to express their opinion on a given topic within 2-3 minutes. Groups can also role-play a certain topic, like bad eating habits or being a bully.

- The teacher can randomly select learners who can read well, to read to the class on a new topic, and then the teacher can start with her lesson.

- Further ideas were that learners in their different groups set a question paper based on the lesson and rotate it between the different groups to complete. Afterwards the class discusses the different questions asked by the groups and point out which questions were asked by all groups and why. The learners will then agree that those questions were the important ones. They can then draw pictures of what they captured from a lesson.

- Supply or draw pictures for which learners can write capitations.

- Give mathematical problems for learners or groups to solve. The learner or the group needs to explain to the class how they got to the answer or where they struggled.

- Give a reading piece full of spelling mistakes for learners individually or in a group to correct.

Assessment was identified as a critical barrier that needs to be addressed. The participants agreed that teachers know what to assess but they do not necessarily know how to do it. The participants thought that the following suggestions could be included in the study material:

- Discuss the assessment expectations with the learners. If the learners ask questions, it will already be an indication of problems a teacher can expect or that she must re-teach before the learners complete the assessment.

- The participants stressed the point that assessment must not be rigid because learners’ abilities differ and all learners need to be accommodated. They requested different assessment examples in the study material (Väyrynen, 2002; Vaughn, Wanzek, & Denton, 2007).

**5.6 PHASE 2: CYCLE 4: R-LEARNING**

Cycle 4 took place within a reflective learning framework (r-learning). This cycle focused on identifying the positive aspects currently experienced in the Learning Support study material and to answer the following secondary question: *What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?* The participants
attempted to look beyond the challenges and rather focused on the assets surrounding us, and projected how to move forward.

The participants reflected on their learning gained during the research journey (cf. 5.6.1; 5.6.2; 5.6.3) by completing an r-learning questionnaire. I used Ghaye, Melander-Wikman, Kisare, Chambers, Bergmark, Kostenius and Lillyman’s (2008) theory on “turn direction,” which requires a major mind shift when moving from a particular way of thinking to another. To analyse the reflective questions, I followed their deductive data analysis approach of

i) appreciative gaze,

ii) reframing, and

iii) moving forward into the goal

As the three themes (cf. 5.6.1; 5.6.2; 5.6.3). I combined Hutchings’ (2000) taxonomy of four questions (cf. 3.6.1), Mezirow’s learning types (2009) (cf. 3.5) and Boyers’ four domains of scholarship (1990) (cf. 3.3.1). In this combination, the participants explored actual or real-life teaching situations to develop a scholarship of teaching and learning. Therefore the critical reflection process is not concerned with the how or how to of action, but with the why which focuses on the reason for the consequences of what we do (Mezirow, 1990).

The participants completed the r-learning questionnaires, using both Afrikaans and English to express their thoughts. With their consent, the Afrikaans answers were translated to English for consistency in language usage in the research. The translations were verified with the participants to make sure it truly reflected their opinions.

The following deductive themes, as obtained from Ghaye, et al., (2008) and categories derived from the r-learning questionnaires reflected the learning and teaching suggestions regarding the improvement of the study material and assignments.

**Table 5.9: Themes and categories of r-learning**

<table>
<thead>
<tr>
<th>Themes:</th>
<th>Categories:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.6.1 Appreciative gaze</td>
<td>Theory</td>
</tr>
<tr>
<td>5.6.2 Reframing</td>
<td>Part of programme</td>
</tr>
<tr>
<td></td>
<td>Change</td>
</tr>
<tr>
<td>5.6.3 Moving forward into the goal</td>
<td>Practice</td>
</tr>
</tbody>
</table>
5.6.1 Appreciative gaze

In the theme of appreciative gaze, the participants analysed the study material by answering three questions (see end of paragraph). They were requested to do this from the perspective of a teacher and not as a student for the following reason: a teacher can reflect if something is working and applicable in a classroom, whereas a student only wants to complete the assigned work to pass the module. This is part of Boyers’ scholarship of discovery to help the participants create an intellectual or academic climate in their journey to generate new and refine existing knowledge (Trigwell & Shale, 2004) (cf. 3.3.1). The following three questions were posed which required a motivation as well:

- How can you apply the theory you learned in the ACE Learner Support programme in your classroom?

- Do you think the theory in the ACE programme exposed you enough to develop critical thinking skills about inclusive education and learner support?

- Do you think that by completing the assignments in the ACE programme, you applied your theoretical knowledge on inclusive education and learner support? If not – give a suggestion on how to compile an applicable assignment.

The following quotations aligned with the emerging of scholarship, based on Boyers’ domains of scholarship (cf. 3.3.1). The participants discussed their perceptions of the applicability of the theory in the classroom and did self-assessment on the development of their critical skills to apply new understandings of inclusive education in their classrooms (Trigwell & Shale, 2004; Woodhouse, 2010) (cf. 3.3). The responses to the questions included the following:

5.6.1.1 Can you apply the theory you learned in the ACE Learner Support programme in your classroom?

The findings proved that the participants reflected positively towards the theoretical knowledge as addressed in the ACE Learner Support programme, but emphasised in all their answers that theory alone is not adequate:

“Yes, but we sit with heaps of theory & definitions but we need practice. This is where one learns about solutions, support, and reality. In theory, you only learn about the nice and the ideal” (P2).

“Yes I can. Knowledge is always good. It is something to fall back on. However, the biggest teacher is the practice and your own experience” (P3).
“In the ACE, you teach us theory and not reality. What you teach us in ACE is not how it is out there [in the classroom]. You remember better with examples. If you only have theory to fall back on and you forget the theory then you can become stuck in a situation” (P4).

5.6.1.2 Do you think the theory in the ACE programme exposed you enough to develop critical thinking skills about inclusive education and learner support?

The participants misinterpreted the second question by only focusing on the word *skill*, and one participant referred to the concept *inclusion*.

Answers based on the word *skills* were the following:

“*To a certain point, but it is still different to practically apply skills on learners. E.g. when a child gets a seizure – what will I do??????*” (P8).

“No, because I am not equipped to help a child in need of sign language. I can assist a child with a language barrier like reading or writing” (P5).

“Yes, we have the knowledge but the skills are lacking. Skills are things that one builds up in time” (P7).

“No, I still do not have adequate knowledge. Inclusion is to include every learner with any disability. When I started teaching, I have never been exposed to a disability. How can I be critical if I am not exposed to real life?” (P4).

5.6.1.3 Do you think that by completing the assignments in the ACE programme, you applied your theoretical knowledge on inclusive education and learner support? If not, give a suggestion on how to compile an applicable assignment.

Question 3 aimed to determine an in-depth understanding of a specific teaching intervention, namely the assignment itself, and not only evaluate the success of the learning intervention. From the question, I wanted to know if the student could apply their gained knowledge in the classroom and not only complete an assignment for the sake of getting marks for the intervention (assignment) (Hutchings & Schulman, 1999; Allen & Field, 2005; Brew, 2006; Hutchings, 2007) (cf. 3.3). All participants’ commented on the assignment for being too general and not focusing on a specific challenge that they need to address in the classroom. They felt the assignment was disconnected from practice and therefore did not integrate theory with practice —they regarded it as a gap between theory and practice. Their view aligned with Boyers’ domain of integration and application of knowledge, and showed evidence of becoming “reflective practitioners” who move from theory to practice, and from practice back to theory,
which could result in making theory more authentic (Schön as cited in Starr-Glass, 2011, pp. 11; 17) (cf. 3.3.1.2 & 3.3.1.3). The following quotes summarised their opinions:

“No [no]. It is too much theory. You need to give us a SIAS document to complete so we can be forced to learn how the process work[s]” (P1) (cf. 5.4.4).

“Not much. What about group work assignment[?] Look how nice we learned from each other in the ALS [action learning set]. Students can work together on a case study as if they are a[n] ILST [institutional level support team] committee and look at from Bronfenbrenner up to a support programme” (P6) (cf. 5.4.2.1.; 5.4.2.2 & 2.2.1.3).

“No, I think we take all the negative things we talked about [purposeful discussions] that is not happening in the classroom and put together an assignment on that? Things like learner-centred approach; different learning styles; pace of learning; flexible teaching methods; multilevel” (P2) (cf. 5.4.3 & 5.5.1).

5.6.2 Reframing

The reframing question searched for answers on the following three questions:

- As an ACE student, did you feel “on the inside” / part of” or “outside” / “alienated” from the programme?
- Where and when do we start to take action and make the students feel part of the programme?
- Who needs to take control to change that?

5.6.2.1 As an ACE student, did you feel “on the inside” / part of” or “outside” / “alienated” from the programme?

Since reframing involves reflecting on the self, values, culture, goals and policies (Rolling, 2008) (cf. 3.5.2), the participants answered this question from their perspective as students.

“I did not feel on the inside as a student. Because of my practical teaching experience when I did the ACE I could see what was happening out there [in the classroom], you can ask questions, and it helps to form ideas that make you feel part of the problem” (P8).

“I would say my practical teaching experience gave me some insight [in the theory] and made me feel part BUT I feel the university can start much earlier to expose students with more sessions that are practical” (P6).

“Alienated. My practical teaching exposed me to reality of inclusive not the course” (P4).
Because I am teaching. That exposed me to what it feels to be inside. You do not learn it in books. But when I started to teach – I was shocked!!” (P1).

5.6.2.2 Where and when do we start to take action and make the students feel part of the programme?

Findings from the second question demonstrated that some participants felt new knowledge in existing meaning schemes (cf. 3.5) can be acknowledged by altering “[with] yourself, [with a] and focus on “a positive attitude” (P1). Even more, “By making a mind shift to become positive (P8).”

Most participants agreed that change starts “in the classroom / lecturer hall where students need to be expose to practice and practical documents e.g. the SIAS document, IEP’s, how to set a timetable” (P3). The participants further felt that change needs to start immediately in consultation with different role players: “Now!!!By bringing those [different role players in education] to conversations who deal with the reality every day” (P4).

It is clear that when the participants consciously started to analyse, evaluate and reflect on the study material, and measure the applicability to their classroom activities (cf. 3.3.1.4) they came to terms with the importance of interaction between theory and practice and the eco-system of knowledge.

5.6.2.3 Who needs to take control to change that?

In answering the third question, the participants seemed to be in agreement with Barr and Tagg (1995), Kreber (2003), as well as Breslow, Drew, Healey, Matthew and Norton (2004) that higher education institutions (HEIs) must not only deliver instruction, but also produce learning in order to enhance scholarship (cf. Chapter 3.3). The participants asserted that the major responsibility lies with the HEIs to adapt the study material of teacher education programmes in learning support to such an extent that students feel part of the programme by linking theory to practice: “NWU [university] needs to connect [link] theory and practice. They are the only people who can do that because they write the modules and assignments” (P3).

It was interesting that the majority of the participants felt their existing meaning schemes needed to be valued in creating new knowledge “The curriculum needs adjustment to make it more practical. They [lecturers compiling study material] must ask us who stand in the classroom for practical examples and make plans to get student out there [in schools] to get experience and to go and observe (P7).” They further asserted that all roleplayers in education (cf. 3.3) need to collaborate to make a difference, as one participant said: “All role players in education. The NWU [university], Department, and teachers” (P6).
5.6.3 Moving forward into the goal

This question searched for answers to the following:

*What suggestions do you have on how the university can improve training for an IE teacher?*

The aim of this question was for participants to highlight the core of what hinders inclusive education to be implemented successfully in the classroom, and to give suggestions to remediate the problem and plan the way forward (cf. 1.2).

5.6.3.1 What suggestions do you have on how the university can improve training for an IE teacher?

The answers to this question revealed that the interaction between theory and practice appears to be a significant factor for them. The following quotation summarises the overwhelming response of the participants’ in their suggestions to move forward:

“Make it PRACTICAL, PRACTICAL, PRACTICAL. Incorporate practice in the theory. Let the student teach. Cut back on theoretical assignments. Lecturers need to be positive realistic and not rigid in their thoughts” (P2).

“Change the curriculum. Give real time examples. Students can for example build up some hours where they need to assist or observe in classrooms” (P7).

“Examples that are more practical should be giving. Especially LSEN have to be linked with practical examples” (P8).

“The lecturer needs to bring practical examples to class for the student to connect theory and practice” (P5).

The next quotes captured the need for students to be exposed to the reality of a school context:

“I suggest that every student must at least be exposed to a school in a deep rural area” (P3)

“They need to see, feel, smell, and experience everything about teaching. That will help them to make up their minds in advance if they want to teach at all” (P6).

“Students need exposure to real teaching outside the walls of NWU [university]” (P6).

“Students need to visit schools, be exposed to real case studies and day trips in the inclusive classroom. People [teachers] that actually applied the knowledge should talk to students or students should observe them in their classrooms” (P8).

5.6.4 Discussion of cycle 3

The findings of this cycle revealed that the participants reflected positively on the theory of the Learner Support programme (cf. 5.6.1.1). It was, however, evident that the core of the problem is a lack of practical experience in a real-life school context (cf. 5.6.1; 5.6.2; 5.6.3). The participants voiced the need to be exposed to support documents, e.g. the SIAS and IEP
documents, timetables (cf. 5.6.1.3; 5.6.2.2) and strategies (cf. 5.6.1.3) for teachers to effectively collaborate in a school. This can be achieved by for example a learner-centred approach; addressing different learning styles; adapting to the pace of learners’ learning; flexible teaching methods; and multilevel teaching (Engelbrecht, 2006; Stofile & Green, 2006; Wildeman & Nomdo, 2007; Chataika, Mckenzie, Swart & Lyner-Cleophas, 2012). The need for practical knowledge (evident from the findings) is in line with my arguments that practical exposure (cf. 5.6.3.1) provides opportunities for reflection and development of theory which in turn give rise to obtain knowledge from and about educational practices (Gilpin, 2007; Kemmis & Mutton, 2011; Mertler, 2012) (cf. 3.3.1.4). Gilpin (2007) further affirms that a student really starts to understand when he/she participates in the application of knowledge (cf. 3.3.1.4). This argument further substantiates the value of Boyers’ (2009) scholarship of integration and application (cf. 3.3.1.2 & 3.3.1.3).

It appears that when the participants identified and named the problems they experience in the classroom, which mostly pointed to a lack of practical exposure, they started to reflect on it, and developed a better understanding of what scholarship entails. They began to see beyond their own known boundaries and saw their classroom with all its activities as part of a larger body of knowledge (Boyer, 1990) by indicating that the HEI can liaise with them as teachers to expose students to practical experience. They further seem to understand the functioning of an eco-system of knowledge (Lynton (1994, p. 10) (cf. 3.3; 6.5) when they referred to the different role players, e.g. the HEI, department of education and teachers who can collaborate and play a role in developing education in South Africa (cf. 5.6.2.3).

A key finding that has been asserted by participants in this cycle is that HEIs need to re-evaluate their training curricula and ensure that teacher education programmes prepare students adequately for the practice of teaching. The participants felt strongly that HEIs could no longer be disengaged from the issues in the real context. The HEI’s therefore need to affirm their role in the eco-system by transferring, but also allowing for knowledge creation to benefit both education and society. This could result in universities empowering students to be committed in addressing human needs as well as resolving social problems (Fourie, 2003) (cf. 6.5; 6.10) that are relevant in a social model in which the inclusive classroom is embedded.

5.7 SUMMARY

From the findings, it is evident that transformative learning took place in the participants: The participants constructed knowledge as enrolled ACE students in the Learner Support programme; then they applied, tested and reviewed the theoretical knowledge against their daily experience in the inclusive classroom. Based on this, they could contribute in the development of the Learner Support study material and therefore make a further contribution to the scholarly
community of inclusive education (cf. 3.3.1.4). Their reflective diaries seemed to have taken them through a process of revelations about themselves as teachers (cf. 5.4.2.1) as well as their teaching (cf. 5.4.2.2). It was as if the participants viewed themselves from a distance and could reflect and comment objectively about the self. This made the diaries a rich data-generating tool: the participants could voice their own feelings and frustrations without feeling exposed, and reflect on their own experiences and their professional growth and development.

Another key positive result from the reflective diaries was the participants’ realisation of the value of collaboration between teachers (cf. 5.4.2.2), achieved in the action learning set meetings where the participants got to know one another, experienced that they all have the same daily needs and challenges and that they could rely on one another, and started to regard the others as mentors.

Although critical with regard to the value of the ACE programme in Learner Support as regards linking theory with practice, the participants reflected positively on the knowledge they gained (cf. 5.4.5). This specifically included themes such as the importance of the socio-ecological system in inclusive education, as well as the usefulness of the SIAS document (cf. 5.4.4.1). It appeared that the ecological system made the participants more aware to view learners holistically and to realise that society has a huge impact on what is taking place in the classroom (cf. 5.4.3.2).

While they acknowledged the right of the learner to be included in the mainstream, they persistently asserted that the current structures of mainstream schools are not conducive for learners experiencing barriers to learning. They felt that the learners would be better off in separate special education settings (cf. 5.4.3.1; 5.4.3.5). The participants were also very frustrated with the DBE for not supporting them (cf. 5.4.3.2) as this made them feel incompetent and hopeless. The participants expressed discontent about the implementation of a flexible curriculum (cf. 5.4.3.4). Overcrowded classrooms, too wide a diversity of learning needs in the classroom, inadequate resources, as well as the demands by the DBE to complete the curriculum within certain time restraints, caused them to struggle to apply flexibility within the curriculum. However, what stood out for me is that the participants continued to try to make “special provision” for learners with “special needs” despite the belief that these learners should not be in their classes (cf. 5.5.5).

As lecturer and participant in the action learning set, I started to understand the reality of their contexts, and why they felt that the theory of textbooks do not always prepare them for the practice of teaching. When I originally began lecturing the Learner Support modules in the ACE programme, I could not understand why this programme was so difficult for them and why they experienced the assignments as problematical. However, when I became part of the action
learning set and started to put myself in their shoes, I developed a deeper understanding of their struggles to complete the ACE course. It also enabled me to explore in theory and practice what inclusive education really entails. The involvement of the participants to critically reflect on the study material and make suggestions to improve it (cf. 5.6.1; 5.6.2; 5.6.3), transformed the participants from teachers to scholars (Kreber, 2007). The transformative learning of the participants, and I include myself, changed our meaning schemes (Mezirow, 1991). Our moral rights, values, and prejudice were challenged when we started to reflect on our own teaching and learning. The moment we took the self out of the picture and started thinking about the learner in front of us, our attitudes changed (cf. 5.4.3.2; 5.5.3). It was then that we came up with solutions (cf. 5.5.5) on how to make inclusion work in the day-to-day classroom. The participants stopped regarding me as a lecturer from an HEI, but rather as a person who came to learn from teachers with experience and how we, together, can make a difference in the inclusive classroom. The participants took ownership of the Learner Support study material and developed a desire to advise other in-service teachers on how to address the challenges and not merely to achieve an ACE qualification (cf. 5.6.1; 5.6.2; 5.6.3).

From this chapter, it is evident that to implement inclusive education successfully through training in higher education still has a long way to go. If eco-systems of knowledge reach a point where all role-players can work collaboratively, learn from one another and understand the functioning of different contexts in giving and creating knowledge (Lynton 1994, p. 10) (cf. 3.3; 6.5), a solution can probably be achieved.

The following chapter presents an overview of the research project, a summary of the research questions, recommendations, limitations and a conclusion.
CHAPTER 6: OVERVIEW OF RESEARCH, CONTRIBUTION, RECOMMENDATIONS FOR FUTURE RESEARCH, LIMITATIONS AND CONCLUSION

6.1 INTRODUCTION

In the previous chapter, I presented the findings and discussion of the data analysis in accordance with the purpose for the research, as set out in chapter. I articulated the implications of the findings through the Participatory Action Learning and Action Research (PALAR) design for implementing inclusive education successfully in the Foundation Phase (FP) and the development of the scholarship of teaching and learning amongst Learner Support students in the ACE programme.

This chapter concludes with an overview of the research results, the contribution, recommendations for further research, and limitations of this research.

6.2 PURPOSE OF THE RESEARCH

The purpose of this research was to explore how an action research process, namely PALAR, can support FP teachers to implement inclusive education in their classrooms while concurrently developing a scholarship of teaching and learning. All the participants, including myself, experienced this research as a journey of professional development. In this process an attempt was made to close the gap between the theory and practice in study material for the wider body of in-service teachers enrolled for Learner Support programmes.

6.3 SUMMARY OF THE RESEARCH

The research chapters can be summarised as follows:

Chapter 1 presented an outline of an inquiry on how a Participatory Action Learning and Action Research (PALAR) approach can assist Foundation Phase (FP) teachers and myself, as researcher and lecturer, to implement inclusive education in our classrooms through a journey of professional development in scholarship, and to close the gap between theory and practice. I presented some background on the history of inclusive education in South African, discussing the relevant research contributions that led to the development of this study’s conceptual framework. The choice of the research site was justified, followed by a brief discussion of the context, rationale, purpose, rationalisation of the methodology and ethical measures taken. The chapter concluded with a brief discussion of the significance of
this research, defined some relevant concepts, and presented an outline of the structure of the research.

**Chapter 2** conceptualised and sketched inclusive education from a South African perspective. The chapter focused on current policies, challenges, and the role of the teacher and training programmes for learner support within the inclusive education approach.

**Chapter 3** demonstrated how a process of PALAR undertaken by participants in the action learning set could develop scholarship of teaching and learning for the wider body of in-service teachers enrolled in the Advanced Certificate in Education (ACE) Learner Support programme. The chapter explained approaches applicable to the development of scholarship through reflective learning and the impact thereof on professional development.

**Chapter 4** described and discussed the research paradigm, design and the value of the research methodology. It outlined the strategies that were followed to generate and analyse the data. It further provided the ethical measures taken to ensure the validity of the research. The chapter concluded by briefly explaining how triangulation and validity of the research as well as the ethics were maintained.

**Chapter 5** presented the data analysis, findings and the discussions generated and interpreted through two phases and four cycles in the PALAR design. The data were categorised under themes that were inductively and deductively derived from the data and related to the research questions as presented in chapter 1. The data were further substantiated with relevant literature and quotations of the participants.

**Chapter 6** concludes with an overview of the research project, the positionality of the research in relation to the literature, the contribution, recommendations for further research, and limitations of this research. The chapter ends with a conclusion derived from the research project.

### 6.4 FINDINGS OF THE RESEARCH

The findings of the research are based on and discussed with specific reference to how the research addressed the research questions (cf. 1.5). In the following subsection, the answers that emerged from the data will answer the six secondary and one primary question of the research project.
6.4.1 Findings of secondary research questions

Since the conceptualisation and understanding of inclusive education are interrelated with how learner support is applied, the findings relevant to the first two questions will be discussed in an integrated manner to avoid repetition. Questions three and four address the challenges that the participants experienced with regard to the theory and the practice of inclusive education. Since the participants asserted that the link between these aspects is a key challenge for them in implementing inclusive education, these two questions will be discussed simultaneously.
### 6.4.1.1 Key findings of first two research questions

- **What is inclusive education?**
- **What does learning support in inclusive education entail?**

<table>
<thead>
<tr>
<th>Key findings</th>
<th>Reference to empirical data</th>
<th>Quotes of participants</th>
<th>Reference to literature review</th>
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<tr>
<td>The participants in general understood the concept of inclusion as integrating diverse learners in a mainstream classroom. Although the participants felt that learners with barriers to learning had the right to equal education opportunities, their responses revealed that the learners would function better in separate classes where they can get more specialised learning support.</td>
<td>(cf. 5.3.1.1; 5.4.1.2.4)</td>
<td>“…all learners are in one class, not like in the past where there was remedial learners alone in one class (FPT 22).” “…an average mainstream school cannot handle it [inclusive education]. Teachers are rushing to get through the curriculum with the mainstream learners…..Will all learners in mainstream schools be willing to accommodate these learners? My experience proofs the opposite! (P8).”</td>
<td>DoE, 2001; Clough and Corbett, 2000; Engelbrecht, Green, Naicker, and Engelbrecht, 2003; Crous, 2004; Engelbrecht and Green, 2007; Ainscow and Miles, 2008; Forlin, 2008; Swart and Oswald, 2008; Winter and O’Rawl, 2010; Savolainen et al., 2011; Swart and Pettipher, 2011a; Schoeman, 2012; Geldenhuys and Wevers, 2013; Lalvani, 2013; Nel et al., 2013 (cf. 2.1; 2.2.1.1; 2.5.1)</td>
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<td>The participants of this study still linked concepts such as special needs with inclusive education and continue to feel that learners having these “special needs” should receive learning support in more specialised settings.</td>
<td>(cf. 5.3.1.2; 5.4.1.2.1)</td>
<td>“From my experience I know that children with special needs will not be respected even teachers act and react differently towards them. Not all teachers have the calling to, or know how, to help learners with disabilities” (P8). “[but] children with special needs need specialised teachers to fulfil their needs and help with their barriers by individual</td>
<td>Hart, 1996; DoE, 1997; Florian, 2007; Ainscow and Miles, 2008; Pather, 2011; Swart and Pettipher, 2011a; Nel, 2013 (cf. 2.1; 2.2.1.1; 5.4.1.2)</td>
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### Key findings

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<tr>
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<td>attention and an adapted curriculum. Work need to be explained continuously and repeatedly [since] most of the learners have a slow work rate [pace], they need assistant teachers” (P6)</td>
<td>Hart, 1996; DoE, 1997; Florian, 2007; Areheart, 2008; Pather, 2011; Bantjes et al., 2015 (cf. 2.3.1; 2.2.1; 2.2.1.1; 5.4.1.2)</td>
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Though not intentional, the above conceptualisations persist in the labelling of and discrimination against learners who experience barriers to learning. It was also evident from the findings that the participants applied learning support from the perspective of the medical model and not from the socio-ecological model.

“Barriers like Spina Bifida. The learner struggles with all perceptual skills, with number concepts and any basic mathematical operation. He will never be able to do what the rest of the class in mainstream can do” (P5)

“…does mainstreaming include learners with cerebral palsy and physically disabled learners? I cannot see and understand how they want to accommodate these learners in mainstream schools. Think about the physiotherapist that must make sure contractions do not form in the hands of a Hemiplegic child. An occupational therapist that must help the Spastic Cerebral Palsied child with all the perceptual milestones he could not experience because of his disability. What about the psychologist that must help the muscular dystrophy child to accept that he has a short life expectancy”(P6)
### Key findings

Previous research findings revealed that the preference for a medical model of support could be as a result of a large population of teachers in South Africa trained before 1994 when this model was applied for learners who were identified with “special needs.”

Therefore, a considerable percentage of mainstream teachers do not have the necessary knowledge and skills to teach and support learners with disabilities in the mainstream classroom. Furthermore, as noted in the findings, (cf. Tables 4.3 & 4.4) teachers who were trained after the introduction of inclusive education still continue to believe and apply a medical model perspective.

### Reference to empirical data

(cf. 5.4.1.2.1)

### Quotes of participants

“I cannot see and understand how they want to accommodate these learners in mainstream schools. Apart from the facilities to be adjusted (ramps are easy to install – everything cost money!!) think about the bathroom facilities, catheterization, change of nappies. These can be done, if we have help. Think about the physiotherapist that must make sure contractions do not form in the hands of a Hemiplegic child. An occupational therapist that must help the Spastic Cerebral Palsied child with all the perceptual milestones he could not experience because of his disability. What about the psychologist that must help the muscular dystrophy child to accept that he has a short life expectancy” (P6).

“[but] children with special needs need specialised teachers to fulfil their needs....” (P8).

### Reference to literature review

Hay, Smit and Paulsen, 2001; Areheart, 2008; Armstrong 2009; Magare, Kitching and Roos, 2010; Swart and Pettipher, 2011a; Chataika et al., 2012; Bornman and Donohue, 2013; Engelbrecht et al., 2015 (cf. Table 4.3 and 4.4); (cf. 2.2.1; 2.2.1.1)

Teachers are struggling to deal with the range of diversity of needs in their classrooms. Consequently, supporting learners who have disabilities in the mainstream classroom seems to remain challenging for the participants in this study.

(cf. 5.4.1.2.3)

“Wonderful!!!! It is the wish and goal of every “real” teacher who wants to help each learner reach his/her full potential.” “........the use of 4-5 different methods in one lesson is impossible. No structure or system can accommodate the wide range of barriers the learners have. Some learners will be left out!!! (P8)”

### Reference to literature review

Armstrong 2009; Magare, Kitching and Roos, 2010; Bornman and Donohue, 2013; Engelbrecht et al., 2015 (cf. 2.2.1.1)
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<th>Key findings</th>
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<th>Quotes of participants</th>
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<tr>
<td>The participants regarded the assignments as inadequate to close the gap between theory and practice. The participants asserted that it needs to be adapted to become more practical, context bound and applicable to the inclusive classroom in South Africa.</td>
<td>(cf. 5.5.5; 5.6.3.1)</td>
<td>“They need to see, feel, smell, and experience everything about teaching. That will help them to make up their minds in advance if they want to teach at all (P6).” “No [no]. It is too much theory. You need to give us a SIAS document to complete so we can be forced to learn how the process work[s] (P1).”</td>
<td>Engelbrecht, 2006; Stofile and Green, 2006; Gilpin, 2007; Wildeman and Nomdo, 2007; Chataika et al., 2012; McKinney, 2012; Nel et al., 2013 (cf. 2.2.1.2; 2.3.3; 2.5.1; 3.3.1.4; 3.5)</td>
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### 6.4.1.2 Key findings of research questions three and four

**What are the challenges that Foundation Phase teachers experience with regard to their understanding of the theory of inclusive education and learner support?**

**What are the challenges that FP teachers experience relating to the practical implementation of inclusive education?**

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<th>Key findings</th>
<th>Reference to empirical data</th>
<th>Participants’ quotes</th>
<th>Reference to literature review</th>
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<tr>
<td><strong>Theory</strong></td>
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<td>In general, theory in the study material was reported as difficult for participants to understand since they cannot make it applicable to their practice.</td>
<td>(cf. 5.4.1.2; 5.6.1.2)</td>
<td>“...but we sit with heaps of theory &amp; definitions but we need practice... In theory, you only learn about the nice and the ideal” (P2). “Yes, we have the knowledge but the skills are lacking. Skills are things that one builds up in time” (P7).</td>
<td>Muthukrishna and Schoeman, 2000; Pather, 2004; Armstrong 2009; Florian and Linklater, 2010; Magare <em>et al.</em>, 2010; Nel <em>et al.</em>, 2011; Strydom, 2011; Swart and Pettipher, 2011a; Modisaotsile, 2012; Geldenhuys and Wevers, 2013; Nel <em>et al.</em>, 2013 (cf. 2.1; 2.2.1.1; 2.3.1; 2.4.8; 2.5.2)</td>
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<td>The theory in the study material reflected a lack of pedagogical knowledge and skills to meet the diverse needs of all the learners in their classroom.</td>
<td>(cf. 5.6.1; 5.6.1.1; 5.6.2; 5.6.3; 5.6.1.2; 5.6.3.1)</td>
<td>“In the ACE, you teach us theory and not reality. What you teach us in ACE is not how it is out there [in the classroom]...” (P4). “No, I still do not have adequate knowledge. Inclusion is to include every learner with any disability. When I started teaching, I have never been exposed to a disability. How can I be critical if I am not exposed to real life?” (P4)</td>
<td>Muthukrishna and Schoeman, 2000; Lomofsky and Lazarus, 2001; SA, 2001; Tembo and Ainscow, 2001; Hart <em>et al.</em>, 2004; Engelbrecht <em>et al.</em>, 2005; Pottas, 2005; Ainscow <em>et al.</em>, 2006; Pather, 2006; Engelbrecht, 2007; Gilpin, 2007; Black-Hawkins <em>et al.</em>, 2007; Greyling, 2009; Florian, 2010; Forlin <em>et al.</em>, 2010; Slee, 2010; DHET, 2011; Florian and Black-Hawkins, 2011;</td>
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<td>Key findings</td>
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<td>Theory</td>
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<td>The theory made participants aware of the need for adaptations and accommodations for learners who experience barriers to learning or who struggle to keep up with the pace of the general progress of learners in the mainstream class.</td>
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<td>“While working through the ACE study material, I came to realize that he [a learner in her classroom] has ADHD and I need to help him.” (P1). “.....I was [also] not aware that we have autistic learners in Foundation Phase, until I read in the study material about characteristics and accommodation of the disability” (P6 and 7). “It is just unfair to expect that the teacher with 40 learners in her class can try new methods to reach that specific learner......” (P5). “[Mem.] you know the problem with the buddy-system is the gap between the learners ability. The one is there [pointing up] and the other one in there [pointing down to the floor]” (P5).</td>
<td>Florian and Linklater, 2011; Kemmis and Mutton, 2011; Kokot, 2011; Pather, 2011; Swart and Pettipher, 2011a; Mertler, 2012; Rouse and Florian, 2012; Savolainen et al., 2012 (cf. 1.2; 2.3.1; 2.5.1; 2.5.23.3; 3.3.1.4)</td>
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<td>There was an understanding by the participants that flexible curriculums and assessment are fundamental principles of inclusive education, including: the use of relevant teaching material, taking diverse learning styles and learners’ rate of learning into consideration, as well as adapting classroom management and organisation to meet diverse learning needs.</td>
<td>The participants emphasised that it is very difficult for them to put a flexible curriculum into practice, since there is too much pressure from the DBE to cover the curriculum requirements within certain time restraints.</td>
<td>“I do not want to hear the word FLEXIBILITY of the curriculum!!!!!! How do we FLEX assessment if the 6 different groups in one class must write ANA’s [Annual National Assessment] in September and half of the class cannot read or write decent[ly]??? The White Paper [EW]6 says flex, but we get one ANA question paper, it’s like Chinese clothes, one size fit all!! How is that for flex?? Do you know what we do?? We train the learners like for a school concert [Ons rig die kinders af soos 'n skoolkonsert] to complete the ANA’s They come in on Saturdays to exercise for that test. You do it otherwise you are in trouble. The school wants to know why are the children not passing and they think you are a bad teacher” (P2)</td>
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<td>The participants became aware of the SIAS document and felt that this is a good tool to use in practice.</td>
<td>It was asserted that more support and practice to apply the SIAS are still needed.</td>
<td>“…we must know about the SIAS document – I saw it in your study material” (P.8). “The SIAS document helped me a lot. If I page through my reflections and</td>
<td>DoE, 1997; Muthukrishna and Schoeman, 2000; Lomofo and Lazarus, 2001; SA, 2001; Väyrynen, 2003; Pottas, 2005; Loreman, 2007; DBE, 2011; Trostle Brand et al., 2012; Geldenhuys and Wevers, 2013; Nel et al., 2013; Swanepoel, 2013; DBE, 2014; Mare, 2015; Marais, 2015 (cf. 2.3.1; 2.4.6; 5.4.1.2)</td>
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<td>et al., 2013; Donohue and Bornman, 2014; SAHRC/ UNICEF, 2014; Engelbrecht, 2015 (cf. 2.4; 2.4.3; 2.4.4; 2.4.8; 2.5.1; 2.4.7; 3.3)</td>
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<td>Key findings</td>
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<td>Theory</td>
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<td>The bio-ecological system of Bronfenbrenner made sense to the participants.</td>
<td>This resulted in them having a broader contextual view of the barriers that learners can experience and how these can impact on their learning.</td>
<td>“The children encourage me. I live with them in the same community – poverty, abuse, alcohol, HIV &amp; AIDS but they are in class and are grateful. They have a will and determination to try” (P5).</td>
<td>Donald et al., 2010; Swart and Pettipher, 2011a; Nel, 2013 (cf. 2.2.1.3)</td>
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<td>The socio-ecological model for learner support was addressed.</td>
<td>It is not clear if the participants understood this model since the application of the medical model was still preferred and applied. Consequently learners were still labelled with “special needs” and it was felt that these learners belong in more specialised settings, since it is too difficult for the participants to teach them in a mainstream classroom.</td>
<td>“Barriers like Spina Bifida. The learner struggles with all perceptual skills, with number concepts and any basic mathematical operation. He will never be able to do what the rest of the class in mainstream can do” (P5). “From my experience I know that children with special needs will not be respected even teachers act and react differently towards them. Not all teachers have the calling to, or know how, to help learners with disabilities. (P8).”</td>
<td>Laszlo, 1972; Plas, 1986; Hart, 1996; DoE, 1997; Engelbrecht et al., 1999; Crous, 2004; Schunk, 2004; Yoon and Kuchinkie, 2005; ETTAD, 2007; Florian, 2007; Naong, 2007; Areheart, 2008; Armstrong 2009; Donald et al., 2010; Magare, Kitching and Roos, 2010; Marais and Meier, 2010; Pather, 2011; Swart and Pettipher, 2011a; Klibthong, 2012; Nel, 2013; Donohue and Bornman, 2014; Bantjes et al., 2015 (cf. 2.2.1.1; 2.2.1.2)</td>
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6.4.1.3 Key findings from research question five

**What are the needs of Foundation Phase teachers with regard to the training of inclusive education and learning support?**

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<th>Reference to empirical data</th>
<th>Quotes of participants</th>
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<td>Participants indicated a need for knowledge and exposure to more practical experiences to enable them to understand inclusive education better, as well as being able to implement it successfully. This includes more practical teaching exercises as well as more assignments focused on case studies.</td>
<td>(cf. 5.4.1.2.2; 5.5.1.5; 5.6.2.3; 5.6.3.1)</td>
<td>“I passed my degree with distinctions at university but I was not trained for this. No book prepared me for this. I need a mentor. If this is what teaching is about, students need practical experience what about a teaching Zuma year?” (P8). “…make it PRACTICAL, PRACTICAL, PRACTICAL. Incorporate practice in the theory. Let the student teach. Cut back on theoretical assignments. Lecturers</td>
<td>SA, 2001; Ainscow and Booth, 2002; Hart et al., 2004; Ainscow et al., 2006; Faller, 2006; Black-Hawkins et al., 2007; Engelbrecht, 2007; Florian, 2010; Forlin et al., 2010; Rous, 2010; Slee, 2010; Booth, 2011; DHET, 2011; Florian and Linklater, 2011; McKinney, 2012; Modisaotsile, 2012; Savolainen et al., 2012; Schoeman, 2012; Nel et al., 2013 (cf. 2.4.8; 2.5.1; 3.3)</td>
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<td>Key findings</td>
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<td>Participants requested more knowledge and training on the SIAS as well as how to complete and use an IEP document.</td>
<td>(cf. 5.4.1.2.3; 5.4.1.3; 5.4.1.3.1; 5.4.3.5; 5.6.1.3; 5.6.2.2)</td>
<td>“…in the classroom / lecturer hall where students need to be expose to practice and practical documents e.g. the SIAS document, IEP’s, how to set a timetable” (P3)</td>
<td>Ainscow and Cesar 2006; DBE, 2008; Reindal, 2008; Swart and Pettipher, 2011b; Geldenhuys and Wevers, 2013; DBE, 2014 (cf. 2.1; 2.3.3)</td>
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<td>The participants indicated a need to learn more about the characteristics of intrinsic and extrinsic barriers to learning.</td>
<td>(cf. 5.4.1.4; 5.4.4.1; 5.4.3.2; 5.4.1.2.2; 5.8.2.4)</td>
<td>“[T]eachers need professional training in special needs education this will help to notice warning signs in advance” (P4). “I was [also] not aware that we have autistic learners in Foundation Phase, until I read in the study material about characteristics and accommodation of the disability” (P6 and 7).</td>
<td>DoE, 1997; Lomofsky and Lazarus, 2001; SA, 2001; DBE, 2008; Donald et al., 2010; Prinsloo, 2011; Swart and Pettipher, 2011a (cf. 2.3.1; 2.7)</td>
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</table>
Summary
The participants of this study indicated a willingness to improve their knowledge and skills in order to support learners who experience barriers to learning by enrolling in an ACE in Learner Support As they did not feel sufficiently trained. The importance of adequately trained teachers to ensure the successful implementation of inclusive education is a central international debate (Azedo, 2012; Engelbrecht, 2013). Research (e.g. Florian & Rouse, 2009; Forlin, 2010; McCrary, Lechtenberger & Wang, 2012; Savolainen et al., 2012; Schoeman, 2012) found that this could be regarded as a pivotal factor in the challenge to embrace inclusive education as a fundamental approach to educate all learners.

6.4.1.4 Key findings from research question six

What does the development of scholarship of teaching and learning entail to ensure an attitude of lifelong learning?

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<tr>
<td>PALAR was used in this research as a method to develop the students’ that were enrolled in the ACE Learner Support programme, the scholarship of teaching and learning in order to assist them in implementing inclusive education and also become lifelong learners. This meant that I, as teacher educator, incorporated these students who were also in-service teachers, as active participants in an action learning set to improve the study material of the ACE programme. This helped them (and me) to become more knowledgeable and skilled in order to support learners who experience barriers to learning within an inclusive education setting. In this process we confronted the status quo of the field of education.</td>
<td>(cf. 5.4.1.2; 5.4.1.4) “This ACE study material and the action learning set were beneficial to me. When I see the large number of learners in our school with various challenges and I see how desperately they need support, I realise that you need to gain as much knowledge as possible. I therefore grab every opportunity to broaden my knowledgebase to help the learners in my class and the school as a whole” (P3). “…What about group work assignment [?]. Look how nice we learned from each other in the ALS [action learning set]. Students can work together on a case study as if they are an ILST [institutional level support team] committee and look at from Bronfenbrenner up to a support system.”</td>
<td>Hutchings and Schulman, 1999; Zuber-Skerritt, 1992a; Hutchings, 2000; SA, 2001; Hart et al., 2004; Allen and Field, 2005; Ainscow et al., 2006; Brew, 2006; Black-Hawkins et al., 2007; Hutchings, 2007; DBE, 2011; McKinney, 2012; Nel et al., 2013 (cf. 1.2; 2.5.1; 3.3; 3.5.4; 3.3; 3.3.1.1; 3.3.1.2; 3.6.1)</td>
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### Key findings

*quo* of our own educational practices and generated our own explanations for what is happening in our classes with regard to inclusive education.

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<th>Reference to empirical data</th>
<th>Quotes of participants</th>
<th>Reference to literature review</th>
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<td>programme” (P6).</td>
<td>Engelbrecht and Green, 2001;</td>
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<td>“…I think we take all the negative things we talked about [purposeful discussions] that is not happening in the classroom and put together an assignment on that? Things like learner-centred approach; different learning styles; pace of learning; flexible teaching methods; multilevel” (P2).</td>
<td>Hart <em>et al</em>., 2004; Ainscow <em>et al</em>., 2006; Black-Hawkins <em>et al</em>., 2007; Florian and Linklater, 2010; Florian and Black-Hawkins, 2011; Rouse and Florian, 2012 (cf. 2.4.6; 2.5.2; 3.3)</td>
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<td>As participants we took action and reflected on our current teaching. Key challenges that we recognised the need to be addressed for successfully implementing inclusive education in classrooms in South Africa, included for example: recognising the impact of contextual issues on learning, such as poverty; the emotional needs of learners; and not applying inclusive education principles such as learner centered- or collaborative teaching.</td>
<td>“Through my reflection journey I came to realize that I only teach for the middle group. There is no time to help the child with problems and the strong child does not get enough stimulation and challenges” (P 5). “The ACE study material was a kind of a turning point in the action learning set’s [ALS’s] perspective of the life of our learner’s outside of the classroom. We never thought of them coming from a bio-ecological environment that influences them to become the learners we need to deal with in the class” (P6 &amp; 7).</td>
<td>Laszlo, 1972; Plas, 1986; Hart <em>et al</em>., 2004; Schunk, 2004; Yoon and Kuchinke, 2005; Ainscow <em>et al</em>., 2006; Faller, 2006; Black-Hawkins <em>et al</em>., 2007; Naong, 2007; Donald <em>et al</em>., 2010; Florian, 2010; Rous, 2010; Slee, 2010; Slee, 2011; Black-Hawkins, 2011; Rouse and Florian, 2012 (cf. 2.4.6; 2.5.2; 3.3)</td>
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<td>As their lecturer I became conscious of the fact that the study material as well as the assignments used to supposedly prepare them to support learners who experience barriers to learning in their classroom do not link theory with practice.</td>
<td>“Examples that are more practical should be giving. Especially LSEN have to be linked with practical examples” (P8). “The lecturer needs to bring practical examples to class for the student to</td>
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<td>Key findings</td>
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<td>Several data collection methods which critically reflected and analysed the ACE in Learner Support's study material as well as our own practices, all the participants in the action learning set projected a new way forward. Ghaye, Melander-Wikman, Kisare, Chambers, Bergmark, Kostenius &amp; Lillyman, (2008, p. 361) indicated that professional development is rooted in change when a person &quot;turn(s) direction.&quot;</td>
<td>(cf. 5.6.1.1; 5.6.3.1)</td>
<td>“Change the curriculum. Give real time examples. Students can for example build up some hours where they need to assist or observe in classrooms” (P7). “In the ACE, you teach us theory and not reality. What you teach us in ACE is not how it is out there [in the classroom]. You remember better with examples. If you only have theory to fall back on and you forget the theory then you can become stuck in a situation” (P4)</td>
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<td>From here on we focused on changing direction by adapting the assignment and the study material to close the gap between theory and practice, as well as encouraging students to become more reflective about their own teaching in an inclusive education classroom.</td>
<td>(cf. 5.5.5; 5.6.1; 5.6.2; 5.6.3)</td>
<td>“The curriculum needs adjustment to make it more practical. They [lecturers compiling study material] must ask us who stand in the classroom for practical examples and make plans to get student out there [in schools] to get experience and to go and observe” (P7). “All role players in education. The NWU [university], Department, and teachers” (P6)</td>
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</table>
Summary

In an attempt to assist the wider body of in-service teachers enrolled in the ACE Learner Support programme to become better inclusive teachers, I employed a PALAR research design with eight participants in an action learning set. It turned out to be of great value for the participants: "I learned a lot because of the interaction with the other teachers in the action learning set. I really met some mentors, and the strange thing is, they were always only a few classes away but I was not aware" (P2). Researchers (McKinney, 2012; Nel et al., 2013) found that collaborative partnerships initiate a process of developing scholarly thoughts and actions by sharing insights, evaluating and building on such learning that has been gained together. Since the participants were also in-service teachers, we were exposed to typical challenges and frustrations they experience in inclusive classrooms. With that in mind, we addressed these aspects when adapting the study material and assignments through a process of scholarly reflection.

Through collaboration, critical evaluation and reflection on the current study material and our own practices, we aimed to improve the study material to become more context-relevant for the typical Learner Support in-service teacher who enrolls in distance education.

6.4.1.5 Key findings from primary research question

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<th>Key findings</th>
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<td>In a PALAR approach, participants collaborate to work towards a solution for a problem. The participants valued the collaboration, since we came to realise that we all struggle with similar daily frustrations to implement inclusive education and can learn from one another to reach a solution.</td>
<td>(cf. 5.4.1.1.1; 5.4.1.1.2)</td>
<td>&quot;.....because of the interaction with the other teachers in the action learning set. I really met some mentors, and the strange thing is, they were always only a few classes away but I was not aware&quot; (P2).</td>
<td>DoE, 1999; Bornman and Rose, 2010; Florian and Linklater, 2010; Lomofsky and Lazarus, 2010; Swart and Pettipher, 2011a; McKinney, 2012; Nel et al., 2013 (cf. 1.2; 2.5.1; 2.5.2)</td>
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<td>Through the PALAR approach the teachers got the opportunity to develop reflective and critical thinking skills by means of critiquing the policies on inclusive education against their day-to-</td>
<td>(cf. 5.4.1.1.1; 5.4.1.3.1; 5.4.1.4)</td>
<td>&quot;....I think it [SIAS document] must be compulsory [as] from Gr R onwards&quot; (P2). &quot;[Individual Education Programmes] IEP should form the basis of lesson planning for</td>
<td>SA, 2001; Hart et al., 2004; Ainscow et al., 2006; Black-Hawkins et al., 2007; Florian and Linklater, 2010; DBE, 2014 (cf. 2.5.2; 3.3)</td>
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day classroom knowledge and the Learner Support study material.

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<th>day classroom knowledge and the Learner Support study material.</th>
<th>each learner’s achievement” (P6 and 7) “While working through the ACE study material, I came to realize that he [a learner in her classroom] has ADHD” (P1) “But I first want to complain about this WP6” (P8).</th>
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On evidence of the above matters, the decision-making of the teachers developed which resulted in adapting the Learner Support study material to be more context-relevant for the wider body of in-service teachers to implement inclusive education in their classrooms.

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<th>On evidence of the above matters, the decision-making of the teachers developed which resulted in adapting the Learner Support study material to be more context-relevant for the wider body of in-service teachers to implement inclusive education in their classrooms.</th>
<th>“....I live with them in the same community – poverty, abuse, alcohol, HIV &amp; AIDS....” (P5) “....But come and live in my community and you will see what is real” (P5).</th>
</tr>
</thead>
</table>

Summary

Through the PALAR process, the FP teachers became aware that inclusive education is more than merely a concept in study material or some steps to follow to support a learner with barriers. They came to realise that inclusive education entails an equitable and supportive education system where different role players need to collaborate to implement it successfully. Through collaboration in the action learning set, they identified the gaps between theory and practice, reflected upon it and implemented some adaptations to the Learner Support study material that will enable the wider body of in-service teachers to also become aware of what inclusive education really entails, along with some practical suggestions to implement it more effectively in their classrooms.

Hutchings and Schulman, 1999; Rose, and Howley, 2001; Väyrynen, 2002; Trigwell and Shale, 2004; Allen and Field, 2005; UNESCO, 2005; Brew, 2006; Ainscow, 2007; Alonzo et al., 2007 Dee, 2007; Hutchings, 2007; Ketterlin-Geller and Tindal, 2007; McDonnel et al., 2007; Rose, 2007; Shepherd, Hasazi, 2007; Vaughn et al., 2007 Woodhouse, 2010; Schön as cited in Starr-Glass, 2011 (cf. 3.3; 3.3; 3.3.1.2; 3.3.1.3 Table 5.9 Barriers and adaptations thereof in study material; Appendix C The adapted assignments)
6.5 RECOMMENDATIONS

Based on the findings after six months of critically analysing, in a participatory action learning set, how we experience the implementation of inclusive education in practice and how effectively the ACE programme in Learner Support prepares in-service teachers for an inclusive classroom, the following recommendations are being made:

- In the development of in-service teacher education programmes and study material it is critical that lecturers at HEIs and in-service teachers form a joint relationship. This can be effected by employing a holistic dialectic thinking (HDT) approach (Zhang, Fung, Stanley & Isaacowitz, 2014) where knowledge is created co-operatively through continuous reflection between and about learning, teaching, professional development and research (cf. 3.4). The success of this depends on knowledge being regarded as more than a discipline and pedagogical procedure, but as the key to “transmit, transform, and extend” knowledge (Boyer, 1990, p. 16; Richlin & Cox, 2004).

- In-service teachers mainly perceive themselves as teachers and not as scholars (Kreber, 2007). The onus, therefore, firstly rests on HEIs to take responsibility for their role in the “eco-system of knowledge” (Lynton 1994, p. 10) and secondly to develop the habit of scholarly reflection in their students when they enrol for further educational studies. In attaining the above, I would recommend that HEIs review their teaching and learning designs in the new ADE Learner Support programmes to trigger the teachers’ (students) inquisitive minds (Trigwell & Shale, 2004) (cf. 3.3.1.1). This can be done by incorporating Boyer’s (1990) four domains to transform scholarly activities into new knowledge. When in-service teachers discover and search for knowledge they re-awaken their intellectual side abilities and engage in critical reflection, start to question their beliefs, values and assumptions, and begin to discover new perspectives (Mezirow, 2009). The new knowledge contributes to the vitality of the academic environment and provides new directions in which academic work can be conducted which can possibly result in life-long scholarly learning skills (Boyer, 1990; Zuber-Skerritt, 2011). This requires an interactive learning process to ensure transformative learning (Pegg, Reading & Williams, 2007 as cited in Wood & Zuber-Skerritt, 2013) (cf. 3.5) and an end goal of teachers enrolled in further studies of becoming critical as well as creative thinkers and life-long learners.

- It is also recommended that the newly adapted study material for the ACE in the Learner Support programme should be submitted for a critical peer review in order to establish if these adaptations not only address the needs of in-service teachers, but also the development of scholarship and teaching.
6.6 POSSIBLE CONTRIBUTIONS

- A pivotal contribution of this study is that it demonstrated that teacher education programmes need to be careful to develop these programmes in such a predominantly theoretical way that it is not applicable to practice. Although theoretical grounding is central to teacher education, it is how theory is applied that transforms practices. Yet, in the process of applying and integrating theory with practice, teachers can be developed as scholars by gaining skills in critically analysing theory and practice. This requires that they are able to reflect on the self, investigate, inquire and develop curiosity that will lead to problem solving with purposeful questions and answers (Boyer, 1990; Bass, 1999; Shulman, 2011). This study has demonstrated that a PALAR approach can be successfully used as an instrument to transform teacher education programmes in not only achieving academic requirements, but also contextual needs.

- Since I was an active participant in the action learning set of the PALAR approach, I benefitted through gaining context-based knowledge. This encouraged me as a lecturer in an HEI to reflect critically on how I design and plan a teacher education programme as well as how I teach my modules. I realised that theory needs to be put into context, but that I needed to understand these contexts first. Including my students as active participants in their own learning and professional development and by improving their reflective and critical thinking skills, became priority learning outcomes for me. This resulted in improving my own academic scholarship as well as those of my students. Although this contribution is a singular subjective outcome it seemed to positively impact on my students as well and on their practice. I therefore believe that I need to explore it in other programmes that I teach, but that it also needs to be explored further in other studies.

- The use of reflective diaries as a data-collection method to generate rich data in participatory action research was shown to be successful. Through the diaries the participants could express their true feelings and frustrations and not feel exposed to other’s opinions and judgements. The participants were also able to step back when they interpreted their reflections and then objectively get to terms on how to improve their teaching and learning by doing self-assessment.

- It is important to underline that the aim of the research was not only to build theory (how a PALAR approach can assist FP teachers to implement inclusive education in the classroom) but also to improve and understand social practices, processes and conditions to transform old teaching ways (Zuber-Skerritt, 2011) into scholarly teaching (cf. 3.6).
• The research further contributed to produce methodological knowledge on the terrain of PALAR in education and pointed to an approach that should be considered when aiming to develop scholarship in FP (or even in other phases) teachers to implement inclusive education in the classroom.

• After several database searches (e.g. ebsco host, google scholar, JSTOR, scopus), it appears that the PALAR approach to develop scholarship in a South African inclusive classroom has not been conducted yet. This study can therefore provide a springboard for further such studies.

• This research also illustrated that although in-service teachers are predominantly focused on being trained for better practices, they did demonstrate openness to the possibility of developing a scholarship of teaching and learning.

6.7 RECOMMENDATIONS FOR FURTHER RESEARCH

• Using PALAR as a research method to refine inclusive education and learner support teacher education programmes, on both pre-service and in-service levels, is recommended. This can be helpful in ascertaining if PALAR can assist in improving these programmes as well as transforming teachers into scholars of teaching and learning.

• Since this research could not explore whether the participants had developed an established sense of scholarship of teaching and learning, it is important that a follow-up study further investigates this.

• Applying PALAR in different school contexts to determine if inclusive education is being successfully implemented, could add to the research field.

• Exploring the usefulness of the SIAS by employing a PALAR approach can contribute to evaluate whether this is a useful tool for teachers to understand intrinsic barriers, and whether contextual influences or external factors impact on learning.

• Using the PALAR approach to improve HEI lecturers’ own scholarship of teaching and learning could also be explored.
6.8 CHALLENGES AND LIMITATIONS OF THE RESEARCH

- As a result of the small sample and the qualitative mode of data gathering, the findings of this study are limited in the sense that it cannot necessarily be generalised to other contexts. However, the aim of the study was not to indicate general trends. The goal was to seek in-depth information from the participants’ point of view to improve our teaching and learning, as well as to develop scholarship.

- One of the initial challenges of the research was for the participants to accept me as a participant in the action learning set. They had to understand that I want to learn from them. This was difficult in the beginning, since I was their lecturer in the ACE Learner Support programme. As a result they were at first hesitant to express their criticism toward the study material. It was, therefore, important to convince them that for the purpose of this research I am not in a power relation, but on the same level as them in wanting to learn about real contexts in order to improve the programme. I used a relationship-building technique (cf. 1.7.3.2) which served as an important ice breaker for the participants to understand that I am also a participant. In time, with more effort from my side, we established a good understanding and our partnership flourished into a relationship of trust and respect.

- Trustworthiness and credibility were of the utmost importance for the successful completion of the research. The reader needs to keep in mind that the major part of data generation happened through reflective diaries, in which the participants reflected on more than the inclusive classroom. They trusted me with information close to their hearts and I had to be sensitive when sifting the data to focus on only data relevant to the research and not to become biased in my opinions. Although this research seemed to have awoken a sense of scholarship of teaching and learning, the period of data collection was too limited to determine if the participants will continue to enhance these new-found skills.

6.9 EVALUATING PALAR AS A RESEARCH DESIGN

In this research, PALAR seemed to be the appropriate research design to use for data generation because it led to transformation of both the participants and the context in which the action took place (Pedler, 2008). Collaboration in the action learning set gave each participant an opportunity to reflect on his/her own practice and suggestions on how to improve teaching and learning in an inclusive education classroom.

Since an action learning set is based on democratic principles, there were no power struggles but PALAR rather stimulated intellectual curiosity to activate us all to become scholars of our own teaching and learning, and in the process to link action and learning (Zuber-Skerritt, 2011).
(cf. 3.2). Each participant was regarded as equally important and honest to the self and others. We were there to build trust, to respect others, to reflect on viewpoints, to value opinions and to take responsibility for our own actions (Pedler, 2008). The PALAR process was a journey of personal and professional growth, which I can recommend for further research of this kind.

6.10 CONCLUSION

Teachers in South Africa are at the forefront of implementing inclusive education successfully in schools. It is therefore imperative that teachers are capacitated with knowledge and skills to be enabled to enact inclusive education. Teachers need support but, as deducted from the research, the support structures in education are reluctant in the provision thereof. For that reason, HEIs should take the lead in empowering teachers to develop scholarship in order to become confident in their roles as leaders in the transformation process. Inclusive education will then be valued for its stance on human rights, values of dignity, acceptance, non-discrimination and equal opportunities for all—not as special needs education (Crous, 2004; Swart & Pettipher 2011a).

"Education is the most powerful weapon, which you can use to change the world."

*Nelson Mandela*
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Department of Education (DoE) see South Africa. Department of Education.


North-West University (NWU). (2015). Class list. ACE: Learner Support Unit for Open Distance Learning (UODL). North-West University. Potchefstroom Campus. Potchefstroom.


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doi:10.1016/j.ijedudev.2014.11.005 Elsevier


doi:10.1080/00228958.2012.707506


Dear Madam / Sir

Permission to do research

Marinda Neethling lecturer at the School for Continuing Teacher Education, North-West University, Potchefstroom Campus intend to collect data for the research project on Foundation Phase / Learner Support ACE programme initiated by the NCEPU.

The data is relating to teachers professional development, of the learner support programme towards education in their classrooms.

I hereby request your permission to have purposeful discussions with some of the staff at your school. The discussions will last about 30 minutes. Classroom observation will be conducted from time to time. Observations will not reflect on schools but will serve as a means to me to get in touch with real life classroom experiences. It will further determine the impact of a learner support programme on teaching practice in the inclusive classroom.

I pledge to maintain professional and research ethical codes. This signifies that:
- The participation of all respondents in this research remains voluntary
- Anonymity and confidentiality of all participants' personal information is guaranteed
- No demands will be made on academic teaching programmes
- The research findings will be made available to your school, should you request it.

Could you please provide me with your written consent by completing the sections on the next page.

Your support of our research is highly appreciated

Yours sincerely,

MM Neethling
Lecturer at the North-West University
Personnel number: 12698866
Tel number: 018 286 5900
Principal of the Free State Province School

Permission for research project

Letter of permission: Principal

I, ______________________________________________________

(Name and surname), principal of the Free State Province School give permission that Marinda Neethling may visit the school and carry out her research. I further give permission that the teachers may voluntarily participate in the research. I am informed, that the participants may withdraw from the research if they feel so and that their personal information as well as the name of the school will be treated as confidential.

________________________________________________________________________

Name and signature

________________________________________________________________________

Date
23 April 2014

Permission for research project at the Free State Province School

Letter of permission: Teachers

I, ____________________________________________________________

(Name and surname), teacher at the Free State Province School here bye declare that I voluntarily participate in the research project of Marinda Neethling. I understand that I can withdraw at any time from the research and that my personal information as well as the name of the school will be treated as confidential.

______________________________________________________________

Name and signature

______________________________________________________________

Date
APPENDIX B
QUESTIONNAIRES

APPENDIX B1
INCLUSIVE EDUCATION

Questionnaire for Advanced Certificate in Education (ACE) Foundation Phase (FP) bursary programme with two learner support modules

Thank you for being willing to complete the questionnaire
Please complete the questionnaire with great honestly.
If you are uncertain, do not hesitate to ask me for assistance.
Your answers to this questionnaire will be confident; therefore do not write your name or your student number on the form.

Participation number ___________________

The purpose of the questionnaire is to explore your current knowledge on:

- the concept of inclusive education and
- how you support learners who experience barriers to learning in your classroom.

Category 1: Knowledge

Question 1
What do you understand under the concept / term inclusive education?

--------------------------------------------------------------------------------------------------------------------------
--------------------------------------------------------------------------------------------------------------------------
--------------------------------------------------------------------------------------------------------------------------
--------------------------------------------------------------------------------------------------------------------------
--------------------------------------------------------------------------------------------------------------------------

Category: 2: Skills

Question 2

How will you support a learner in your class who experience a barrier to learning?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Biographical information

Question 3

3.1 Please indicate your gender by answering the question with X in the relevant box

<table>
<thead>
<tr>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
</table>

3.2 What is your age? ____________ years

3.3 How many years of teaching experience do you have? ____________ years

3.4 What is the highest level of education that you completed? – Please indicate by answering the question with X in the relevant box

1. NPDE
2. ACE
3. Bachelor’s degree or equivalent
4. Bachelor’s degree
5. Bachelor’s degree & PGCE
6. Other

How many years of training did you complete at the Higher education institute (HEI) where you received your training? ____________ Years?

At what type of HEI did you received your training?

Thank you / Dankie / Ke a leboga
APPENDIX B2
R-LEARNING

Questionnaire for Advanced Certificate in Education (ACE) Foundation Phase (FP) bursary programme with two learner support modules

Thank you for being willing to complete the questionnaire

Please complete the questionnaire with great honestly.

If you are uncertain, do not hesitate to ask me for assistance.

Your answers to this questionnaire will be confident, therefore do not write your name or your student number on the form.

Participation number ___________________

The purpose of the questionnaire is to explore your reflection on how you currently experience the learning support study material. Please look beyond the challenges you face daily in the inclusive classroom and focus on the assets surrounding you. From there on, projected how we can move forward and support the in-service teachers to successfully implement inclusive education in the classroom.

Question 1

Appreciative gaze

*How can you apply the theory you learned in the ACE Learner Support programme in your classroom?*

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Do you think the theory in the ACE programme exposed you enough to develop critical thinking skills about inclusive education and learner support?

Do you think that by completing the assignments in the ACE programme, you applied your theoretical knowledge on inclusive education and learner support? If not – give a suggestion on how to compile an applicable assignment.

Question 2

Reframing

As an ACE student, did you feel “on the inside” / part of or “outside” / “alienated” from the programme?
Where and when do we start to take action and make the students feel part of the programme?

Who needs to take control to change that?

Question 3
Move forward into the goal

What suggestions do you have on how the university can improve training for an IE teacher?

Thank you / Dankie
APPENDIX C
ASSIGNMENTS

The two adapted assignments based on the participants’ suggestions.

APPENDIX C1
DISABILITIES TO LEARNING

The aim of this assignment is to apply the knowledge you have gained from an actual case. Therefore, everything that you do or write, must be about the learner that you have identified for this assignment.

More and more learners with barriers to learning are integrated into mainstream schools, not only according to IE policy, but also as special schools are full and acceptance of learners in these schools has become difficult. Mainstream teachers are increasingly confronted with diverse needs of learners. Therefore, teachers should be able to identify barriers to learning, and create greater flexibility in their teaching and assessment. With this in mind, answer the following questions.

The learner in your class has difficulty in mathematics. From this perspective, where will you start to support the learner?

You first need to compile a diagnostic profile of the learner.

- Begin on page one of your manual and make a short checklist of all the different disabilities (diagnostic profile) that the learner might have or not have. For example, check if he / she has a physical or intellectual disability OR a sensory disability OR a learning impairment. (Chapter 1-3)

- Check if the learner differs from your temperament or learning styles and how you can adjust these to support the learner. (Chapter 4)

- Does the learner have a language difficulty? (Chapter 5)

- Does the learner have a reading difficulty? (Chapter 6)

- Does the learner have a written language difficulty? (Chapter 7)

- With all this background of the learner, describe his/her mathematical barrier and compile a support plan. (Chapter 8)
Question 1 focus on the diagnostic profile, keep it short, be creative in compiling a profile and, if you suspect the learner is experiencing any form of a barrier, write a short motivation.

Question 2, work through chapter 8 and describe the barrier with examples of areas in which the learner struggles. You may attach examples of work done by the learner

Compile a detailed support plan covering a period of 4 weeks.

MARKING SCHEME

<table>
<thead>
<tr>
<th>Technical and Organisational Structure</th>
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<tbody>
<tr>
<td>Content page</td>
<td>5</td>
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<tr>
<td>Introduction / conclusion</td>
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<tr>
<td>Assignment lay-out</td>
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<td>In-text referrals</td>
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<tr>
<td>Bibliography</td>
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<tr>
<td>Diagnostic profile</td>
<td>35</td>
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<tr>
<td>Mathematical barrier</td>
<td>30</td>
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<tr>
<td>Support plan</td>
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<tr>
<td><strong>Total marks</strong></td>
<td><strong>100</strong></td>
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</table>
APPENDIX C2
INCLUSIVE EDUCATION

Adapted assignment on inclusive education

The aim of this assignment is not to test your factual knowledge, but to determine whether you are able to apply your knowledge to a specific context, such as in the classroom, school, community, etc.

Answer the following questions:

Question 1
2.1. According to the White Paper 6 on special needs education, what is inclusive education and training?

2.2. Do you think the school where you are teaching is an inclusive school? Please motivate.

Question 2

2.1. Name and discuss the different support structures in inclusive education.

2.2. What is the value of the SIAS document for you as a teacher in an inclusive classroom?

Question 3

Discuss what you understand by different teaching strategies in the inclusive classroom.

Question 4

How will you flex assessment in your inclusive classroom to support learners’ diversity and give everyone a fair chance to be evaluated according to his / her ability?
### Allocation of marks

**MARKING SCHEME**

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<tr>
<th>Question 1</th>
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<tr>
<td>2.1. According to the White Paper 6 on special needs education, what is inclusive education and training?</td>
<td>15</td>
</tr>
<tr>
<td>2.2. Do you think the school where you are teaching is an inclusive school? Please motivate.</td>
<td>15</td>
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<tr>
<th>Question 2</th>
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<tr>
<td>2.1. Name and discuss the different support structures in inclusive education.</td>
<td>15</td>
</tr>
<tr>
<td>2.2. What is the value of the SIAS document for you as a teacher in an inclusive classroom?</td>
<td>15</td>
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<tr>
<th>Question 3</th>
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<tbody>
<tr>
<td>Discuss what you understand by different teaching strategies in the inclusive classroom</td>
<td>20</td>
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<table>
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<tr>
<th>Question 4</th>
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<tbody>
<tr>
<td>How will you flex assessment in your inclusive classroom to support diversity in learners and give everyone a fair chance to be evaluated according to his / her ability?</td>
<td>20</td>
</tr>
</tbody>
</table>

| Total marks                          | 100 |

APPENDIX D
PHOTOS

Photo examples of reasons given for not being able to apply a flexible curriculum included the following: the emphasis on learners passing the ANAs (Annual Assessments); learners being passed on to the next grade without fully achieving the requirements for the current grade; overcrowded classrooms; and the range of diverse needs in one classroom (cf. 5.4.1.2).

“...We train the learners like for a school concert [Ons rig die kinders af soos vir ‘n skoolkonsert] to complete the ANA’s...” (P2) (cf. 5.4.1.2.3).
"...They have an average of 17% [summative assessment] but the system forces progress with support, to the next grade..." (P3) (cf. 5.4.1.2.3).

The one participant cut A4 papers into small blocks and wrote numbers on them to teach the learners place values in mathematics (cf. 5.5.3).
Overcrowded classroom with diverse learners and limited resources (cf. 5.5.1.2)

The space allocated for activities in the Gr 1 book is too small or too narrow for some of the learner’s underdeveloped fine motor skills (cf. 5.5.3).
Kyk na die blou sirkels op die getallekaart.
Wat let jy op omtrent hierdie sirkels?

Vlggende getallereeks uit:
799; 797; 795; ; ;
783; 785; 787; ; ;
779; 781; 783; ; ;

Die korrekte getal in elke sirkel op hierdie allyne in.

al met 3 syfers.

Vlggende syfer is twee meer as . Hier minder as sewe.
Meer vanaf hierdie getal in tiene vorentoe tel?