

PLANNING FOR INCLUSION

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What Legal Basis Exists for Inclusion?

The Individuals with Disabilities Education Act, or IDEA -- the public law that requires schools to provide each child with a disability with a "free appropriate public education" - does not use the term "inclusion." Rather, IDEA refers to providing each eligible student with a free appropriate public education in what is known as the "least restrictive environment" (LRE), with the accommodations and supports necessary for the student to benefit from his or her education. Specifically, the legislation states:

- (b) Each public agency shall ensure –
- (1) That to the maximum extent appropriate, children with disabilities, including children in public and private institutions or other care facilities, are educated with children who are non-disabled; and
 - (2) That special classes, separate schooling or other removal of children with disabilities from the regular educational environment occurs only when the nature or severity of the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.
- (Code of Federal Regulations Title 34 Section 3000.550 (b) (1)-(2)).

In a November 23, 1994 memorandum to the Chief State School Officers, the U.S. Department of Education offered clarification regarding IDEA's least restrictive environment provisions, which state "IDEA's strong preference for educating students with disabilities in regular classes with appropriate aids and supports" (Heumann & Hehir, 1994, p. 3). This memo makes it clear that a student's placement in the general education classroom is the first option the IEP team must consider.

An integral part of deciding whether or not the student will be educated within the general education classroom is an individualized inquiry into the possible range of aids and supports that are needed to ensure that the student can be educated satisfactorily in that environment. If the IEP team determines that the student can be educated satisfactorily in the general education classroom, "that placement is the LRE placement for that student" (Heumann, 1994, p. 2). Thus, while not a mandate for inclusion, IDEA's LRE requirements give quite adequate support for its practice.

However, the IEP team may determine that the student cannot be educated satisfactorily in the general education classroom, even when appropriate aids and supports are provided. An alternative placement must then be considered. Accordingly, schools are required to ensure that "a continuum of alternative placements is available to meet the

needs of children with disabilities for special education and related services" [34 CFR Section 300.551(a)]. This continuum must include the range of alternative placements listed in the definition of special education -- specifically, "instruction in regular classes, special classes, special schools, home instruction, and instruction in hospitals and institutions" [Section 300.551(b)(1)]. According to a September 16, 1994 memorandum to the National Education Association (NEA), the U.S. Department of Education stated that the required continuum of alternative placements "reinforces the importance of the individualized inquiry, not a one size fits all' approach in determining what placement is the LRE for each student with a disability" (Heumann, 1994, pp. 2-3). As such, the requirement for a continuum of alternative placements provides support for those who argue that inclusion cannot and should not be required for all students, that decisions about placement in the mainstream, in separate classes or schools, or in a mixture of both, must be made on an individualized basis, considering the student in question and his or her special needs.

The Inclusion Debate

Inclusion has become an issue of great discussion and sometimes heated debate. There are many supporters whose statements ring with commitment. "As an advocate for inclusion," says one inclusion facilitator, "I believe in it so strongly that no argument against it can ever sway me. I have seen it work and I know that it is the right thing to do for all students, classes, and schools" (Tashie et al., 1993, p. 10). In contrast, there are organizations and individuals who are deeply concerned about the movement toward inclusion. The American Federation of Teachers has called for a moratorium on full inclusion policies, stating that "unwise and unrestrained inclusion is creating unbearable conditions in classrooms across the country" (Shanker, 1993) due to the lack of adequate teacher training and support within the classroom, among other factors (Shanker, 1994). These factors concern the National Education Association (NEA) as well. What appears to be fueling the controversy is the practice of "dump and hope" that some school districts are using under the name of inclusion -- placing students in general education classrooms without needed supports, without training teachers, with only the "hope" that it will work.

In contrast to "dump and hope," NEA's policy supports and encourages "appropriate inclusion characterized by practices and policies which provide, on a sustained basis," for:

- ** a full continuum of placement options and services within each option;
- ** appropriate professional development;
- ** adequate time for teachers to plan and collaborate on behalf of all students;
- ** class sizes responsive to student needs;

** and staff and technical assistance appropriate to teacher and student needs. (Chase, 1995, pp. 45-46)

And, of course, there are many who support inclusion philosophically but who feel strongly that decisions about whether or not to include children with disabilities must be made on a case-by-case, child-by-child basis, taking into account each student's special needs. The Learning Disabilities Association of America (LDA), for example, has stated that, while the general education classroom can provide many benefits to students with learning disabilities, it is not the appropriate placement for those students who may need "alternative instructional environments, teaching strategies, and/or materials that cannot or will not be provided within the context of a regular classroom placement" (LDA, 1993).

In many locations, the debate no longer centers around "Should we include or shouldn't we?" As the inclusion movement gathers momentum and experience, and as successes are achieved, many school systems have moved beyond wondering if and are asking: How? How do we include?

And with that question come many others: How do we give our teachers the training essential to making inclusion work? What supports and accommodations will students need in order to thrive in the general education class, and how do we provide those supports in that environment? How do we ensure that the education of other students won't be disrupted or instruction diluted? What will all this cost, and how do we pay for it?

For those considering or undertaking inclusion, the resources annotated in this News Digest will provide much guidance concerning policy, planning, and implementation issues. A series of companion bibliographies is currently under development and will provide additional resources on how to address the needs of students with specific disabilities and how to include students with disabilities in specific classes.

Reform Initiatives

Educational reform discussions and the national Goals 2000 initiative have resulted in widespread reform through which inclusionary programs have been created, studied, and furthered in many states. As part of this effort, many states have what are known as Systems Change projects, whose activities are intended to enhance the capacity of the states to serve students with severe disabilities in general education settings. These Systems Change projects have provided the field with dynamic lessons in how to "do" inclusion.

If you, as a parent, teacher, administrator, or advocate, are interested in inclusive educational practices, it will be important to access the "inclusion" network already existing within your state (and within the country) and take advantage of the experience, resources, and materials of others. Contact the state director of special education and ask if a Systems Change project exists within your state. Another source of this information

may be your state's Parent Training Information Project (listed on the NICHCY State Resource Sheet). If your state does have a Systems Change project, it may be a ready source of materials and expertise. Even if no such project exists, ask what sources of state and local assistance exist -- for example, what school systems in the state are involved in inclusion -- and contact them. They may have many lessons to share about their experiences with inclusion and may be able to provide guidance regarding the elements of inclusion that are critical to its success.

Components of Appropriate Inclusion

Most of the books annotated in this News Digest present detailed information and guidance on the "how-tos" and "what-to-consider" of including children with disabilities in general education class-rooms. Indeed, there is much to consider, for both research and practice have shown that "inclusion programs can work, but they take tremendous effort and considerable resources" (U.S. General Accounting Office, 1994, p. 3). This section lists, in abbreviated fashion, many of the factors emerging as critical to establishing successful inclusionary practices and programs. Readers are then referred to the resources listed in this publication which provide more detailed guidance.

** Establish a philosophy that supports appropriate inclusionary practice. The philosophy will serve as both the foundation for and a stepping stone to achieving inclusion. For example, LEARNS (Local Education for All in Regular Neighborhood Schools) in Maine states its belief that:

ALL students benefit from education that values and practices the recognition and support of diversity. All students can be successful, grow and learn in regular schools and classrooms when individually designed supports are provided. (LEARNS, n.d., p. 2).

Who develops such a philosophy statement? Best practice suggests that a philosophy supporting and affirming the learning of all students needs to be established at the state level, district level, and building level (Simon, Karasoff, & Smith, 1992), through discussion and agreement of major stakeholders. The responsibility for educating children and for deciding how and where children will be educated exists at each of these levels, and a clearly articulated philosophy at each level provides decisionmakers with a framework within which to weigh educational choices and alternatives. It also gives them the authority to commit resources to support the decisions that are made.

** Plan extensively for inclusion. Planning needs to include all those who will be involved in and affected by whatever inclusion is planned. If a large-scale inclusion is anticipated, meaning that the state has determined that children with disabilities will be educated within general education environments, then system-wide planning and capacity building must take place. If the inclusionary effort is limited to one school, then intensive planning and preparation needs to occur at that site. Team work and collaboration at the local school are always essential to addressing and answering (a) the many questions that come with inclusion generally and (b) the specific issues associated with the inclusion of each specific student. It is also vital that there be someone clearly "in charge" of the

inclusion effort. Among other things, this person (or persons) would have responsibility for: calling meetings of those involved in planning; coordinating and overseeing IEP development and implementation for individual students; ensuring that staff (including paraprofessionals) receive ongoing training; seeing that needed resources are made available; and monitoring the overall inclusion effort.

Going slowly and thoughtfully and planning thoroughly maximize the probability of success for all those involved -- teachers, parents, and all students, particularly those with disabilities.

** Involve the principal as a change agent. The presence of a proactive, visible, and committed principal is often crucial to successful inclusion (Working Forum on Inclusive Schools, 1994). If the principal is not already involved in the inclusion movement, then his or her support must be enlisted. O'Brien and Forest (1989) provide a number of suggestions for how to do this. Through the principal's leadership, a model of accepting and welcoming students with disabilities can be established, collaborative teaming encouraged, planning time for inclusion sanctioned, resources made available, parents involved, and progress made.

** Involve parents. By law, parents are entitled to be fully involved in planning the education of their child with a disability. Beyond the requirements of law, however, including parents in efforts to plan for and implement the inclusion of their child makes eminent good sense -- parents have expert, in-depth knowledge of their child's personality, strengths, and needs and can make substantial contributions to the inclusion effort. As primary stakeholders in inclusion, parents should be included throughout the entire planning and implementation process -- in the early information-gathering and planning meetings, where decisions are made about the shape and scope of the inclusion program; in the IEP meeting where decisions are made about their child's education; and beyond, when concerns or questions arise during the course of a school day or semester. Professional members of the team planning for inclusion can promote involvement of parent team members by appreciating and valuing the type of knowledge that parents bring to the planning table, by communicating openly and honestly with parents, by respecting the family's cultural patterns and beliefs, and by listening carefully to the suggestions and concerns that parents have (Orellove & Sobsey, 1991, pp. 418-419).

** Develop the disability awareness of staff and students. Teachers, classroom aides, and other students in the classroom and their parents need to have an understanding of disabilities and the special needs that having a disability can create. Teachers and aides need in-depth knowledge, in order to understand and meet the student's needs. This will also help teachers establish an atmosphere of acceptance and to plan activities that foster inclusion.

Notwithstanding the fact that "young people have an amazing capacity for acceptance of differences and tend to see students with disabilities as people first" (LeRoy, England, Osbeck, 1990, p. 9), students in general education classes also need information. A discussion of disability -- what it means to have a disability, what it does not mean -- can

help students understand and interact with their peers with disabilities. It is important, however, for the teacher (and other school staff) to know and observe the district's policies regarding confidentiality and to not reveal personal information about an individual student -- including the specific nature of his or her disability -- without the permission of that student's parents. Many teachers have found that the student's parents are valuable partners in developing the awareness of other students and school staff in regard to disability issues in general and their child's disability in particular. Depending on the nature of the student's disability, classmates may also need information about classroom routines that might change, equipment that might be used by the student, safety issues, and any additional individuals who may be in the class assisting the student.

Those involved in planning for and implementing inclusion should also recognize that developing the disability awareness of staff and students needs to be an ongoing activity. Staff leave and new personnel are hired; students leave and new ones arrive. Disability awareness training and activities, therefore, must be provided on a continual basis.

** Provide staff with training. It is unrealistic and unfair to expect general education teachers to creatively and productively educate and include students with disabilities in their classrooms in the absence of adequate training. General educators must be provided with the training they need in order to meet the special learning and behavioral needs of students. This training can come in many forms: seminars at local universities; in-service sessions provided by special educators; and materials specific to the nature of students' disabilities. It is also vital that general education teachers have frequent opportunities for collaborative planning with other teachers, especially special educators, and have ready access to the "disability" network and inclusion specialists who can address specific questions educators might have.

** Ensure that there is adequate support in the classroom. For all those concerned with inclusion, general education must not become a "dumping ground" where students with disabilities are thrown without adequate support to them or their teachers. The IDEA states that when children with disabilities are educated in regular classes, accommodations and supports must be provided as appropriate to each child's special needs. "Some supplementary aids and services that educators have used successfully include modifications to the regular class curriculum, assistance of an itinerant teacher with special education training, special education training for the regular teacher, use of computer-assisted devices, provision of notetakers, and use of a resource room" (Heumann, 1994, p. 2). The supports to be provided should be listed explicitly in the student's IEP, which then documents the school's obligation and commitment to provide the supports.

A primary means of support is the presence of additional staff, when necessary to meet the student's needs. Schools are increasingly relying upon the use of classroom aides and paraprofessionals to provide needed assistance. This person may work with the student individually on adaptations to the curriculum suited to that student's IEP goals and objectives and the content of the subject matter under study, or he or she may provide direct assistance in terms of positioning, notetaking, interpreting, or facilitating

communication or interaction with others.

Another form of support is assistive technology that helps the student operate within the mainstream. Much information is available on the types of assistive technology available to individuals with disabilities (see "Resources" section); it is the school's responsibility under IDEA to identify what assistive technology devices or services would allow the student to benefit from his or her educational experience (34 CFR Section 300.6); these devices or services need to be listed specifically in the IEP. The school is then responsible for providing them to the student and for providing training in how to use the device (34 CFR Section 300.6).

**** Provide structure and support for collaboration.** Collaboration between stakeholders and participants is seen as "the key to successful inclusion of all students in a regular class" and "involves a nonhierarchical relationship in which all team members are seen as equal contributors, each adding his or her own expertise or experience to the problem-solving process" (Stainback & Stainback, 1990, p. 96).

Collaboration needs to occur all along the path of inclusion: during the initial planning stages, during implementation, between home and school, between all members of the student's individual planning team, between general and special educators during the course of the school day, between teachers and administrators, between students. Indeed, the importance of collaboration can not be overemphasized. It is especially important that time be built into teachers' schedules to allow for collaboration; the principal can be of great assistance in making this possible.

**** Establish a planning team for each included student.** Each student with disabilities included in the mainstream needs to have an individual planning team that meets on a regularly scheduled basis and collaboratively discusses and problem-solves the specific details of including that student. This team may look similar to the IEP team and will probably include many of the same members, but its purpose is to "maintain program quality throughout the year...[and] provide a vehicle for creative problem-solving, regular home-school communication, proactive rather than reactive planning, collaborative consultation, and program coordination" (Bodensteiner, 1992, p. 8). Again, collaboration between team members is essential; each member brings to the table expertise and creativity. Working together and pooling their knowledge, team members can do much to ensure that a student's inclusion is successful.

**** Make adaptations.** One of the challenges of inclusion is adapting the general education curriculum (and environment) to meet the needs of students with disabilities. Adaptations can be defined as "any adjustments or modifications in the environment, instruction or materials used for learning that enhances the person's performance or allows at least partial participation in an activity" (Udvari-Solner, 1992, p. 3). For many students with cognitive disabilities, the mainstream curriculum may be too demanding or fast-paced. For students with physical disabilities, many academic tasks pose unrealistic physical demands. Thus, to allow their participation, adaptations must be made because "a student should not be excluded from an activity due to the fact that he/she can perform only a

portion of the required skills" (p. 3). These modifications may mean (a) using materials and devices; (b) adapting skill sequences; (c) providing personal assistance; (d) adapting rules; and (e) adapting the physical environment (Baumgart et al., 1982, as cited in Udvari-Solner, 1992).

There are many creative resources on how to adapt what students with disabilities are studying and what they are asked to do academically. Guidance is also available on how to "fit" a student's IEP goals and objectives meaningfully into the various subjects of the mainstream. Many of these resources are listed in the bibliography section of this News Digest; see the "Which Issue, Which Resource?" cross-reference which appears at the end of this text section for those resources specific to making curricular adaptations.

** Establish policies and methods for evaluating student progress. As general and special education become increasingly united within the context of general education classrooms, questions arise about how a teacher reasonably and fairly evaluates students, particularly students with disabilities who are not working with the same curriculum or for similar goals as their peers without disabilities. Certainly, for students with disabilities, the IEP provides a benchmark against which to measure student progress. Has the student achieved the goals and objectives listed in the IEP? Other questions about evaluation exist, however, including how the performance of students with disabilities will be counted within state reporting systems. Suggestions for student evaluation, and for accountability within reporting systems, are given in many of the resources listed in this document. "Which Issue, Which Resource?" (placed immediately before the annotations begin) identifies some of the primary resources addressing this issue.

** Establish policies and methods for evaluating the inclusion program. One of the concerns that has been expressed about inclusion is the lack of empirical data on its effectiveness. As Martin (1994) writes, "Some inclusion advocates do not want the burden of demonstrating child benefit. That inclusion will be beneficial is an article of faith -- not an issue for evaluation" (p. 39). Yet, "neither parents nor professionals should accept rhetoric in place of data" (p. 42). On a national scale, research into effectiveness is certainly needed; on the local level, schools and communities will want information about how well their program, in all its various aspects, is working. Are students -- those with disabilities and those without -- achieving the outcomes projected? Are teachers getting the training they need, and do they have adequate opportunity to collaborate with others? How effectively are the individual (and other) planning teams collaborating? How do parents feel about the program? What adjustments need to be made to the program to improve its operation? Many of the resources in this document include checklists, questionnaires, and other evaluation materials and guidelines to help you answer these important questions.

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