The
Inclusion
Facilitator's
Guide

by

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and

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Case studies are derived from the authors' actual experiences. In most
cases, pseudonyms have been given and identifying details have been
changed. Real names and identifying details are used by permission.

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About the Authors

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Dr. Jorgensen directs a 4-year model demonstration project for the U.S. Department of Education, Office of Special Education Programs, titled "Beyond Access: A Model that Promotes Learning of General Education Curriculum Content for Students with Significant Disabilities" and teaches in the UNH graduate program that prepares inclusion facilitators. She is also the co-coordinator of a project that prepares future Ph.D. faculty researchers in the area of autism spectrum disorders.

Since 1985, Dr. Jorgensen has worked with public school teachers, parents, and administrators to increase their commitment to and capacity for including students with disabilities in general education classes. She co-coordinated the INSTEPP in-service training project, New Hampshire's Statewide Systems Change Project, and the Equity and Excellence in Higher Education Project. For the past several years, her work has focused on the restructuring of policies, organizational structures, and teaching practices that naturally facilitate inclusion and learning for all students.

From 1992 to 1996, Dr. Jorgensen directed a federally funded school restructuring and inclusion project titled "Including Students with Disabilities in Systemic Efforts to Reform Schools." Based on that project and the experiences of colleagues across the United States, she authored a book titled *Restructuring High Schools for All Students: Taking Inclusion to the Next Level* (Paul H. Brookes Publishing Co., 1998). Dr. Jorgensen edited the *Equity and Excellence* newsletter, co-authored (with Stephen N. Calculator) *Including Students with Severe Disabilities in Schools: Fostering Communication, Interaction, and Participation* (Singular Publishing Group, 1994), and has authored several chapters in other inclusion texts.

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Dr. Schuh is a Research Assistant Professor in the Department of Education at UNH. She received her master's degree in special education from Syracuse University and her doctoral degree in education from UNH. She has been with the Institute on Disability at UNH since its inception in 1987 and is the Project Investigator on numerous projects related to family and consumer leadership development and educational systems change activities in the areas of preschool, students with emotional and behavioral disabilities, higher education, and students with complex medical issues.

Dr. Schuh has more than 20 years of experience in inclusive schools and communities and project management. She is working on systems change in the areas of personnel preparation, leadership development, assistive technology, and inclusive education. In addition, she teaches a course titled Introduction to Exceptionality at UNH.

Dr. Schuh is the author and co-author of numerous chapters and publications related to inclusive communities and serves on the Boards of Directors of several nonprofit organizations including the Disability Rights Center. Dr. Schuh is a founding board member of the Alliance for Community Supports, an organization devoted to serving the needs of young people with emotional and/or behavioral issues through a process of wrap-around support and self-directed futures planning. She travels extensively nationally and internationally, providing technical assistance and learning from others about promoting social justice and full community participation for individuals with disabilities and their families.

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Dr. Nisbet is a tenured associate professor in the Department of Education at UNH. She received her doctorate in education from the University of Wisconsin in 1982 and her bachelor's degree in physical therapy from Simmons College in 1978. She has been conducting research and writing for 24 years on topics related to deinstitutionalization, school restructuring and reform, transition from

school to adult life, supported employment, inclusive adult lives, community services and supports, and issues related to aging and disability.

Dr. Nisbet is a former President of the Executive Board of Directors of TASH, an international organization focused on improving the lives of individuals with severe disabilities and their families through research, training, and advocacy. She chairs the Program Committee for the national Association for University Centers on Disability. Dr. Nisbet also is a founding member of the Board of Directors for the Endowment for Health, New Hampshire's Health Care Conversion Foundation, where she serves on the Program and Strategic Planning Committees.

Dr. Nisbet has published extensively in the field of severe disabilities. She also serves on numerous editorial and advisory boards and presents nationally and internationally. She is Principal Investigator on many state- and nationally funded projects related to the community integration of individuals with disabilities and continues to contribute to public policy reform efforts in New Hampshire and throughout the United States to improve the ability of people with disabilities to fully participate in their communities. She strives to integrate social responsibility and advocacy with academic research, teaching, and service.

Acknowledgments

In 1987, Marsha Forest from the Centre for Integrated Education and Community in Toronto visited New Hampshire to lead workshops for families and educators on the topic of inclusive education. That same year, Carol Tashie moved from Oregon to New Hampshire to become the state's first inclusion facilitator. Jocelyn Curtin, who experiences Rett syndrome, was among the first students with significant disabilities in New Hampshire to become a full-time member of a general education class in her neighborhood school. We would like to acknowledge the contribution of these three women to the lessons we have learned about facilitating inclusion, and we dedicate this book to them.

As international consultants on inclusive education, Marsha and her husband, Jack Pearpoint, led a revolution of sorts in the late 1980s regarding how students with significant disabilities were educated. Inclusion, Marsha said, was when a school made a commitment to educate all students in the mainstream of general education classrooms based on a belief that diversity enhances a school's community. Marsha argued that inclusion went beyond ideas of mainstreaming or integration, where students with disabilities were periodically integrated into a general education classroom but were primarily educated in a segregated class setting.

Marsha talked not only about the shift that was necessary in people's beliefs about educating students with disabilities but also about the professional role changes that were integral to making inclusion work. During her visit to New Hampshire, she coined the term *inclusion facilitator* to describe a special education teacher who was responsible for coordinating all aspects of students' inclusive educational programs. Instead of teaching a classroom full of students with significant disabilities, the inclusion facilitator collaborated with classroom teachers, parents, paraprofessionals, and therapists to figure out what supports would be necessary for all students to be a part of the social and academic life of the general education classroom. Marsha felt strongly that as long as a special education teacher

had responsibilities in both special and general education classrooms, inclusion would not be successful. Her influence on inclusive education continues even after her untimely passing in 2000.

In 1987, Carol Tashie moved from Oregon to New Hampshire and answered an advertisement for a special education teacher of the "severely and profoundly handicapped." Carol had worked for several years in a school for students with significant disabilities and had begun a pilot program where her students came together for part of the day with students from the general education kindergarten located in the same building. She came to believe that educating all children together had benefits for students with and without disabilities, and unbeknownst to her soon-to-be employers, was eager to help all of the students in the district's self-contained classroom make the transition into general education classes on a full-time basis. Carol was the only applicant for the job, and when she talked about the idea during her interview, the school didn't challenge her. They were just hoping that she would take the position!

Carol's experience bore out Marsha's beliefs about the key role of an inclusion facilitator. During Carol's first year at her new job, she worked with the school's principal, parents, classroom teachers, and other staff to make each of her six students fully participating members of age-appropriate general education classes. Carol no longer spent her evenings designing lesson plans for her six students but rather designing adapted materials based on lessons taught in the general education classroom. During the day, Carol spent time in each student's classroom, assisting the general education teacher with whole-class and small-group instruction. Carol facilitated regular team meetings where students' academic, social, medical, and behavioral issues were discussed, and she empowered all members of the team to solve any problems that arose.

After 2 years in this role, Carol wanted to share what she had learned with other families and schools. For the next 15 years, she worked for the Institute on Disability (IOD) at the University of New Hampshire (UNH), directing several state- and federally funded projects that helped move New Hampshire into a position of national leadership in inclusive education. Today, she spends several days each month consulting throughout the United States about inclusive education, though she focuses most of her energies on peace activism.

In 1987, Jocelyn Curtin was an 8-year-old who was bussed across town to a self-contained classroom for students with significant disabilities. Her mom, Marlyn, had just completed New Hampshire's

Family Leadership Series, where she rekindled her vision for Jocelyn to have a typical school experience alongside her friends and neighbors who didn't have disabilities. When Jocelyn was ready to enter third grade, Marlyn began a 9-year advocacy process that resulted in Jocelyn's membership in general education, her graduation from high school in 1997, and a fulfilling adult life in the community.

Jocelyn's inclusive education was not perfect. There were years when her teachers understood the goals of inclusion and other times when Marlyn struggled all year to make Jocelyn's education meaningful. In some of the schools that Jocelyn attended, a special education teacher served in the role of inclusion facilitator, and Marlyn remembers how much easier those years were. She had an advocate on the inside whose sole responsibility was facilitating belonging and meaningful participation for students with significant disabilities. Since graduating from high school, Jocelyn has become an instructor in the Inclusion Facilitator Teacher Education Option in UNH's Department of Education, and her class presentations are cited by students as some of the most meaningful learning experiences in their graduate education.

The stories of these three women are part of the history of inclusive education. The emergence of the inclusion facilitator role and the lessons we learned from these women are woven throughout this book.

A book like this does not get written without real commitment from a publisher, and Lisa Benson, Rebecca Lazo, Steve Peterson, Janet Betten, and Kathy Thurlow from Paul H. Brookes Publishing Co. were instrumental in guiding this book into print. We appreciate their support and patience.

Last, but certainly not least, we are grateful to Julie Moser for her invaluable editorial assistance as we were drafting the manuscript. She shared not only her advanced technical skills but also her beliefs in social justice and inclusive community.

Introduction

The Next-Best Thing

Jan Nisbet

The Inclusion Facilitator's Guide is based on 20 years of work in New Hampshire, other states, and several European countries. Each of the authors has worked with hundreds of students, families, and schools to build their capacity to include all students, and each brings her own perspective, mental models, and experiences to the book. This introduction represents my reflections on the role of the inclusion facilitator in the school reform process.

I have been privileged to work with many educational reformers in universities across the United States. Common to each of their perspectives is a deep respect for children with disabilities and the right of these children to be fully participating members of inclusive public schools and communities. I have served on boards of numerous professional and advocacy associations and served as an expert witness in several landmark legal cases. For the past 18 years I have directed the New Hampshire Center for Excellence on Disability with the expressed mission "to advance policies and systems changes, promising practices, education and research that strengthen communities and ensure full access, equal opportunities, and participation for all persons." For the last 17 years, I have guided and observed these authors' work at the Institute on Disability at the University of New Hampshire. I hope that this book will generate discussion, deep reflection, and friendly criticism that leads us all to become better facilitators of inclusion for all students.

INCLUSION FACILITATORS COMBINE THE ROLES OF GOOD TEACHERS, MEDIATORS, AND SOCIAL CHANGE AGENTS

The role of an inclusion facilitator is consistent with the gradual move of children with disabilities from segregated environments to general education classrooms and neighborhood schools. The pur-

pose is noble; the reality is difficult. In the absence of overall educational reform that recognizes, values, and supports children with disabilities to learn together with those who are not labeled, inclusion facilitators are the "next-best thing." I say this from an armchair where I watch the trends; cheer any school that embraces full inclusion; and grimace at the lack of fundamental reforms at the policy, funding, and higher education levels.

We ask much from an inclusion facilitator. In some schools, inclusion facilitators are part of a cohesive team that embraces the concept of full inclusion, and they work closely with other teachers to ensure that students are learning, have access to the most up-to-date technologies and instructional strategies, and are members of their classrooms in the truest sense of the word. In other schools, inclusion facilitators are social reformers. They work to develop learning teams out of isolated service providers, cajole administrators into reforming school policies to end exclusion, and advocate for individual children who are labeled and educated on the periphery of general education. Finally, there are those who assume the role of teacher in a self-contained classroom, believing that they can change the school, one child at a time, from a learning environment that segregates to one that embraces diversity.

The most strategic, personable, and skilled will be successful. Inclusion facilitators must understand diverse learning styles and strategies, technology and access, and social relationships and facilitation, but they must also understand power, bureaucracies, people's concerns, decision making, negotiation, and community organizing. This fact makes the inclusion facilitator more than a teacher—it makes him or her an agent of social change. This role requires skills unique to this period in educational history.

SUCCESS IS PROPORTIONAL TO THE IMPLEMENTATION OF EDUCATIONAL REFORMS THAT EMBRACE INCLUSION AND DIVERSE STUDENT LEARNING STYLES

In New Hampshire, the Chair of the State Board of Education proposed a new initiative that is sure to disrupt many existing notions about education and its bureaucratic structures. The initiative, called Real World Learning (RWL), is characterized by extending the process of education beyond traditional school environments and formally adopting rules for measuring and rewarding student achievement in real-world learning environments (New Hampshire State Board of Education, 2004). The goal is to weave into the fabric of

education a greater variety of learning experiences that will help prepare students for the real world both during and after completion of traditional classroom education.

This reform proposal requires general education teachers to assume different roles, becoming facilitators, coaches, mentors, and bridge builders between students, the school, and the larger community. This new role for content area teachers nicely parallels the role and responsibilities of the inclusion facilitator, and, if the RWL proposal is adopted and implemented, it will provide an opportunity for general and special educators to work together on improving learning outcomes for all students.

INCLUSION FACILITATORS AND CRITICAL FRIENDS HAVE A LOT IN COMMON

In the 1990s, the concept of *critical friend* was embedded into the school reform lexicon by the national school reform organization, the Coalition of Essential Schools (Olson, 1994). Cheryl Jorgensen played the role of critical friend and inclusion facilitator at Souhegan High School, a Coalition School in Amherst, New Hampshire. Unlike other schools, Souhegan High School started with principles of the Coalition of Essential Schools and added an emphasis on the inclusion of students with disabilities, which had not been clearly articulated in the Coalition's original mission. In many ways, Jorgensen's roles were interchangeable. The ability to see things as an outsider but to have the curriculum, teaching, and attitudinal tools of a teacher proved invaluable as the school attempted to include all students in general education classrooms. During the school's first 4 years of operation, Souhegan High School staff learned many lessons about school reform, inclusion, and the role of the inclusion facilitator (Jorgensen, 1998).

The inclusion facilitator serves as both a peer and a critical friend. His or her success will be proportional to the school's commitment to an inclusive mission, vision, and values. The inclusion facilitator must be an excellent teacher and mentor and, at the same time, a master of the art of negotiation and change agentry. Being an inclusion facilitator will continue to be a sometimes lonely and frustrating job until university teacher education programs prepare all teachers to believe that all children can learn and should be taught in heterogeneous classrooms.

Although schools like Souhegan High School embrace the concepts of diversity and inclusion, there are still too many students

who are left out and educated separately. There must be a constant flow of new teachers who value diversity and inclusive teaching practices as well as educational environments that adopt reflective practice and are committed to whole-school learning. Without this influx and commitment, the inclusion facilitator will only affect some children for small periods of time, and after the child leaves middle school, for example, and goes on to high school, he or she may face 4 years of resource rooms and trailers that send the clear message that some do not belong or are too difficult to teach.

We must be careful not to focus too much on the inclusion facilitator as the point of innovation. It is not enough to have a new kind of teacher or a new member of the school personnel. The new kind of teacher must coexist with changes in the curriculum, teaming, school climate, and community engagement. The title of *inclusion facilitator* should also be a label assigned to administrators, who should share many of the same skills as inclusion facilitator teachers. School administrator preparation programs often coexist with special education administrator programs, but they are treated as separate. Why?

It is true that there are legal, procedural, and fiscal complexities associated with the Individuals with Disabilities Education Act of 1990 (PL 101-476) and its amendments, Section 504 of the Rehabilitation Act of 1973 (PL 93-112), and Medicaid, but in the end, funding streams and roles must be integrated in a way that ensures that all students receive a high-quality education. The Regular Education Initiative included this as a proposal in the early 1990s. Because attitudes had not changed, many people feared that if funding streams and roles were fully integrated, then students with disabilities would not benefit from targeted resources and supports. Thus, there is an ongoing reluctance to fully merge resources, programs, and roles.

INCLUSION FACILITATORS EMERGE FROM IDIOSYNCRATIC PERMUTATIONS OF HIGHER EDUCATION SPECIAL EDUCATION, GENERAL EDUCATION TEACHER TRAINING, AND COMMUNITY ORGANIZING PROGRAMS

Seymour Sarason wrote,

> The preparation of educators should have two related, difficult, and even conflicting goals: to prepare people for the realities of schooling, and to provide them with a conceptual and attitudinal basis for coping with and seeking to alter those realities in ways consistent with what we think we know and believe. (1993, p. 129)

The terms *inclusion facilitator* (Jorgensen, 1998), *change agent* (Fullan, 1993), *linker* (Havelock, 1971), *community organizer,* and

bridge builder (McKnight, 1995) stand apart from the word *teacher* even though teachers assume many of these roles formally and informally. The term *teacher* conjures up a set of characteristics that are historical and often stereotypical—a person focused almost exclusively on student learning in his or her classroom.

Rarely does one associate the word *teacher* or use it inter-changeably with the word *change agent*. This is in part because the roles typically are not interchangeable due to the lack of clarity or consensus in teacher training programs about how to organize certi-fication programs and curriculum. Special educators often complete coursework separately from their general education counterparts. Community organizing or systems change courses are not offered as part of the curriculum. There is some attention given to collabora-tion, teaming, and working with families in university coursework, but few new teachers graduate with a deep understanding of their emergent and important role as agents of change in their school. Even if they perceive their role as such, they do not have the skills or support to begin the long journey of change that requires under-standing power and bureaucracy, organizing teachers and families to work toward change, and engaging in continual self-reflection and constant learning as they move forward (Senge et al., 2000).

Inclusion facilitators are really teachers who emerge within the larger context of teaching for social justice and recognize the rela-tionship between individual learning, environmental influences, social attitudes, and past experiences (Darling-Hammond, French, & Garcia Lopez, 2002). Fullan (1993) reminded readers that teaching is a moral profession that requires the skills of change agentry. In addition, Senge and colleagues identified systems thinking as a learning discipline necessary for effective schools and education that can be "a powerful practice for finding the leverage needed to get the most constructive change" (2000, p. 8).

Sarason has argued for a fundamental restructuring of teacher education. His experience as a practitioner at Southbury Training School in Connecticut, an institution for people with disabilities, is reflected in his ongoing criticism of labeling, separation, and segre-gation of students with disabilities within schools.

> What I find both discouraging and appalling is how educators at all levels of responsibility assert agreement with the goal of helping each child realize his potential and then say nothing about how the organ-ization and culture of schools undercut that goal, about how teaching children, not subject matter, is made impossible. I am not advocating that teachers become agents of social change. I am advocating that they become agents of school change, that they not see themselves as powerless victims of an uncomprehending public. (1993, pp. 127–128)

Each of these educational leaders has influenced the conceptualization and development of the inclusion facilitator—a role that embodies moral understanding of human rights, social justice, inclusion, and belonging for all students; knowledge of the importance of working across disciplines within a community as a collaborator; the ability to teach and problem-solve to create a universally designed curriculum and teaching strategies that can benefit all students; and recognition of the importance that families and friends play in the educational and social development of children with disabilities. Fullan (1993) and Senge and colleagues (2000) referred to a similar set of core capacities as personal vision building, inquiry, mastery, and collaboration. Although vague language related to these core capacities can be found in the special education teacher standards promulgated by the Council for Exceptional Children and the National Council for the Accreditation of Teacher Education, the means by which these essential core capacities are interpreted in teacher education programs determine whether new teachers acquire them (Council for Exceptional Children, 2003).

In my broad experience in the field since the 1980s, I have encountered only a few teacher education programs that focus on, rather than allude to, the skills necessary to support the requisite organizational and personnel changes necessary to bring about full inclusion of students with and without disabilities. As a rule, institutions of higher education do not prepare their graduates to bring about or manage change. The question is "Why?" Sarason (1993) argued that, with the exception of John Goodlad, few scholars have engaged in critical discussions of teacher education programs and the necessity for change. The development of the inclusion facilitator as an agent of school change falls outside of traditional and most current special education and teacher preparation programs.

In a recent Advanced Seminar in Special Education at the University of New Hampshire, I asked the students, "What is a special educator? What skills do special educators need? What are they supposed to do? How are they different from so-called regular educators?" The answers were all different. Some confusion ensued, and we agreed that they were confused because the design and purpose of their education was confusing.

Some saw themselves as facilitators, some only as classroom teachers. Others saw themselves as consultants. All agreed that they were expected to be many things to many people depending on the status of inclusive education or special education practices in their schools.

Higher education could help straighten out some of these issues if there was more clarity in teacher education curriculum and a clearer vision and articulation of the role of special educator—if one exists. The role of the inclusion facilitator is clear, but it exists as a subtype, a specialization, or a mutation.

INCLUSION FACILITATION IS ABOUT MENTAL MODELS

What we believe about children with disabilities affects how we work and teach. If a teacher believes, for example, that children with autism have enormous capacities for communication and that movement dysfunction plays a strong role in their inability to easily demonstrate what they know, then he or she intervenes in a certain way. If he or she believes that the "least-dangerous assumption" (Donnellan, 1984) is to presume competence within all children, then he or she views each child as capable of learning complex information. If administrators believe in the importance of natural proportion as a context for learning, then they structure class-rooms so that about 85% of students do not have disabilities (Brown et al., 1983). If they believe in the positive behavioral ap-proaches, then they organize schools and interact with students in ways that communicate respect and use instructional supports that encourage appropriate behavior without using aversive procedures (Sugai, 1996).

Inclusion facilitators embrace these mental models. They oper-ationalize them depending on their school culture and context: one system at a time, one school at a time, one classroom at a time, or one child at a time.

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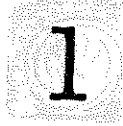
From Special Education Teacher to Inclusion Facilitator
Role Revelations and Revolutions
Mary C. Schuh and Cheryl M. Jorgensen

The role of the special education teacher has changed dramatically since the 1980s. The focus of educational law and practice concerning students with disabilities has shifted from gaining student access to education to improving student academic results, as measured in part by their progress within the general education curriculum and their membership in general education classrooms (Hardman & Nagle, 2004; Individuals with Disabilities Education Act Amendments of 1997 [PL 105-17]). As a result of this shift, special education teachers are being required to assume different and more comprehensive responsibilities (Lipsky & Gartner, 1997). Despite this change in the role of the special educator, few teacher education programs have been on the forefront or have even kept up with this trend. Although the ability of educators to teach all students well has become a rhetorical high ground, this goal has yet to be reflected in traditional general or special teacher education programs (Brownell, Rosenberg, Sindelar, & Smith, 2004). Thus, there is a need to define roles, responsibilities, and titles that bridge the gap between changing expectations and the way that special educators are being prepared.

This chapter will describe areas in which the special educator's role has changed most dramatically, including

- The evolution of job titles, position responsibilities, and knowledge and expertise

- The shift from classroom teacher to facilitator of supports through team collaboration

- The increasing emphasis on advocacy and schoolwide leadership

- The increasing responsibilities as liaison between school, home, and the community

EVOLUTION OF A NEW ROLE

Throughout the years, efforts to include all students into the general education setting have been known by many names. *Mainstreaming* was the term used in the mid-1970s to describe the practice of having students with disabilities receive most of their education in separate classes, although part of their school day was spent in general education classes such as art, music, and physical education. *Integration* was coined in the late 1970s to describe the practice in which students with disabilities were full-time members of general education classes, even if they continued to learn from a different curriculum and had different expectations. Today, *inclusion* is defined as the practice of educating all students in general education classes, including those students with the most significant disabilities, with support being provided to enable both students and teachers to be successful.

Many people who are trained as professional special education teachers experience a contradiction between their academic preparation and what is expected of them in the field. In the past, early definitions of best practices included community-based functional skills programs, individualized education programs (IEPs) that emphasized therapeutic interventions, pseudofriendship programs such as peer buddies, and segregated classrooms. Today, best practices for students with disabilities demand that teachers acquire a different set of skills during their initial and continuing professional education, such as strategies for teaching all students literacy skills, creating socially just school communities, facilitating authentic friendships, embedding service learning into the curriculum for all students, being accountable for every student's achievement, and promoting inclusion in general education (Jorgensen, 2003).

For many special educators, moving from special education to general education is as awkward as visiting another country without knowing the language or the cultural expectations. The authors of this book searched for special educators who have experienced this educational and cultural change firsthand, making the transi-

tion from teaching in self-contained classrooms to supporting students with disabilities to become fully participating members of the general education classroom and school.

One indicator of this transition is the introduction of a new job title and role for many special educators: inclusion facilitator. An Internet search of the term *inclusion facilitator*, conducted in August 2004, produced more than 1,000 references. Schools and school districts across the country (including those in San Francisco; Greenwich, Connecticut; Delaware; Lisle and Indian Prairie, Illinois; White Elementary School, Kansas; Maine; Allegheny County, Maryland; Newton and Belchertown, Massachusetts; Ewing, New Jersey; New York; Altoona, Pennsylvania; Pasadena, Texas; Utah; Vermont; and Fairfax County, Virginia) and around the world have developed new job titles to describe those teachers who facilitate the inclusion of students with disabilities into general education settings. These titles consist of inclusion facilitator, inclusion teacher, integration facilitator, inclusion support teacher, inclusion specialist, learning specialist, and inclusion consultant, among others. In addition, many other teachers, such as life skills teachers, resource teachers, educational liaisons, and special education teachers, fulfill the role of facilitating inclusion, even though their job titles do not use the term *inclusion facilitator*.

Dr. Douglas Fisher, a faculty member in the teacher education program at San Diego State University and author of many publications about inclusive education, remarked

> *No terms are the same in California as they are in the rest of the country. But, we are good at translating. In San Diego, the position of a teacher who supports inclusion of students with significant disabilities is called "inclusion itinerant," whereas it is called "inclusion support teacher" in Palm Springs, and "advocate teacher" in East County.*

Regardless of the job title or position description, this new role requires significant changes, especially for those teachers whose previous duties primarily involved teaching students in "special," self-contained classrooms. What are these teachers' biggest challenges in their new role as inclusion facilitators? What prepared them for this changing role? What information and skills do they wish they had before assuming what has been the career challenge of a lifetime?

To answer these questions, one of the authors, Mary Schuh, interviewed four self-defined inclusion facilitators: Elaine Dodge, Sandy

Hunt, Catherine Lunetta, and Frank Sgambati. All four are educators who have been in the field anywhere from 3 to 27 years and were trained as special education teachers. Interviews were conducted by telephone, in face-to-face conversations, and through follow-up e-mails if clarification was necessary. Dr. Schuh developed questions to learn about the following:

- Their titles and responsibilities

- The knowledge and skills they believe are necessary to be effective as inclusion facilitators

- The shift from classroom teacher to facilitator of supports through team collaboration

- The increasing emphasis on advocacy and schoolwide leadership to support all students

- Their increasing responsibilities to serve as liaisons between school, home, and the community

- Their views on what it takes to create sustainability within their school communities

Evolution of Position Responsibilities, Knowledge Needed, and Job Titles

The evolution of job titles and responsibilities related to the practice of including all students in general education settings is similar across school districts. The interviews revealed that educators who work as inclusion facilitators—no matter what their title— must develop a wide range of knowledge in addition to educational, administrative, and communication skills. Because contemporary position responsibilities have expanded across a number of skill sets and fluctuate daily, inclusion facilitators must also be able to respond to change flexibly, quickly, creatively, and competently.

Biographical Information   Inclusion facilitators are known by different titles, and the interviewees shared diverse experiences related to their current role expectations.

Elaine Dodge   On leave from her school position and currently working as Distinguished Educator for the New Hampshire Department of Education, Elaine travels around the state providing training and technical assistance to teams who are developing stu-

dents' alternate assessment portfolios. When she first entered the profession, she taught at a segregated school for students with disabilities. For the last 20 years, however, she has worked in public schools supporting the inclusion of students with significant disabilities.

When Elaine worked as the inclusion facilitator at Moultonborough Academy, New Hampshire, her title was Life Skills Teacher. Working with approximately eight students, all with varying needs, Elaine's job required her to wear many professional hats. Her students varied in age and grade level, disability label, and the priority of their educational goals.

"Most of my students were working on a regular high school diploma, so I had to support them in mainstream classes, supervise their paraprofessionals, and facilitate the input of related service providers," she recalled. Elaine also taught a remedial reading class for middle school students and a high school–level consumer math class. She needed to be skilled in teaching reading and math to a diverse group of students, and as a team leader she had to employ highly developed communication and management skills.

Sandy Hunt   Sandy has been a special educator for 27 years, including her current position as an elementary school inclusion coordinator. She taught for many years at Mt. Lebanon School, in Lebanon, New Hampshire, which pioneered inclusion in New Hampshire in the 1980s. Sandy now supports 25 students with significant disabilities in four different schools. Sandy's position responsibilities include providing support to general education teachers, serving as the team leader to plan and implement student supports, serving as home–school liaison, and evaluating and supervising paraprofessionals.

"I am not in any one school for a whole day, so I connect the paraprofessionals to their teachers and principals. I am a support teacher to the process," she described. In this configuration of the inclusion facilitator role, Sandy must effectively use a range of skills including evaluation and supervision, time management, and scheduling to accommodate the four school sites. She also uses her solid background in education in her role as the specialist assigned to students with severe disabilities.

Catherine Lunetta   Before getting her master's degree in education, Catherine worked for more than 20 years as a social worker. Her current title is Special Education Liaison, and her responsibilities are wide-ranging. She is the administrator who coordinates the

development of students' IEPs and their initial and 3-year evaluations, and she facilitates team meetings for a variety of purposes.

"That is the easy stuff," Catherine laughed. "My more important responsibilities are making sure that students are successful in inclusive classrooms and making sure that the supports are in the classrooms to accommodate their needs and the needs of the overall class and teachers."

Catherine supports 20 students in one elementary school (in grades 3–5) who experience a variety of educational challenges, such as hearing difficulties, attention-deficit/hyperactivity disorder, English as a second language, learning disabilities, behavioral challenges, autism spectrum disorders, and multiple disabilities. Catherine's role changes from consultant to administrator to expert, depending on the situation. Similar to other inclusion facilitators, she must possess a high level of knowledge across a variety of educational fields to succeed in her role.

Frank Sgambati   Frank has had a long and productive career in special education. He began his career as an assistant teacher of children with significant disabilities who attended a program in a church basement before the first federal special education law (i.e., Education for All Handicapped Children Act, PL 94-142) was passed in 1975. From 1978 until 1987, he was a teacher at Laconia State School and Training Center, which was at that time New Hampshire's state institution for people with significant disabilities. Shortly before Laconia became the first public institution in the United States to close in 1992, he left to work for the New Hampshire Department of Education as the first state consultant for students labeled as having "severe and profound" disabilities. These students were being educated in public schools for the first time, and Frank's job was to provide training and technical assistance to local teams. Frank collaborated closely with the Institute on Disability (IOD) at the University of New Hampshire (UNH) during his work with the state department; after working together with this organization to help many schools become more inclusive, Frank decided he needed to experience firsthand what it was like to support students in general education classes.

From 1991 until 1995, Frank worked as an inclusion facilitator in the Kearsarge Regional School District; from 1995 until the present, he has been a technical assistance consultant with the IOD supporting local schools' capacities to educate all children within inclusive general education settings.

Knowledge and Skills When students were first included in general education classrooms, most parents and educators were content if students were invited to birthday parties, received telephone calls from classmates, and were generally accepted into the classroom community (Falvey, 1995; Strully & Strully, 1989). Increasingly, however, all concerned individuals are paying greater attention to students' learning, including the development of literacy skills such as reading, writing, and technology use, and the acquisition of core academic knowledge (Erickson, Koppenhaver, Yoder, & Nance, 1997; McSheehan, Sonnenmeier, & Jorgensen, 2002; Wehmeyer, Sands, Knowlton, & Kozleski, 2002). Thus, inclusion facilitators must have demonstrated competence in general education, special education, and a variety of facilitation skills (e.g., consulting, mediation, coaching) to be successful in their roles. Each inclusion facilitator interviewed expressed frustration about his or her preservice education. They recommended that undergraduate and graduate programs provide future special education teachers with a clearer understanding about their roles and the experience and educational background needed to work in the field.

Sandy explained that her work currently focuses on connecting students with their classmates and supporting meaningful access to the curriculum. She commented, "Back when I was prepared to be a teacher, people didn't think that students with significant disabilities could access the general curriculum, so they didn't teach us to have high expectations." Sandy has worked in her role as inclusion facilitator for 11 years, learning primarily through in-service training workshops, participation in special model demonstration projects, or simply through "trial by fire."

Catherine wished her degree program had taught her more about managing the actual classroom teaching process, such as how to effectively support two students in one class when they are not performing at grade level or have physical or behavioral challenges. She remarked,

> I wish I had learned more in the area of literacy instruction and curriculum adaptation techniques for all students. I don't want to just supplement what is happening; I want to be qualified to have a good basis on how to teach students.

Catherine said that her special education degree program did not provide her with an adequate background in general education. She took one reading class, but it was not enough to prepare her with the skills she would need in her role as inclusion facilitator.

"Reading is so important . . . and there is so much self-esteem and social relationships tied to reading," she noted.

Elaine considered it crucial to improve students' reaching and grasping, to focus their eye gaze, and to teach them other access skills. "Skills need to be drilled, learned, and generalized," she added.

To improve student outcomes and increase access to and participation in general education settings, an inclusion facilitator must connect the knowledge and skills needed to coordinate and implement a variety of student supports. Elaine had to learn about collaboration and teaming skills, technology, and augmentative and alternative communication (AAC) on her own. "Most assistive technology wasn't available when I started, [so I had to] keep an open mind about new approaches and to become as computer literate as possible and stay abreast of new developments."

Because the knowledge needed to work effectively as an inclusion facilitator is broad, the interviewees identified a variety of competencies needed to prepare for their roles, including

- Administration, management, and collaboration skills

- Teaching techniques—especially literacy

- Specialized knowledge in the areas of movement, personal care, communication, assistive technology, and emotional-behavioral and social relationships

These broad knowledge and skill areas have been organized into a set of competencies for inclusion facilitators based on research (Ryndak, Clark, Conroy, & Stuart, 2001) and recommendations from a variety of national professional organizations such as the Council for Exceptional Children, TASH (formerly The Association for Persons with Severe Handicaps), and the American Association on Mental Retardation (AAMR). Appendix A, described more fully in Chapter 9, contains a description of the competencies that form the foundation of the UNH's Inclusion Facilitator Teacher Education Option.

Job Titles   Job titles may seem incidental, but creating and using an accurate title consistently and throughout differing cultures and fields helps others to identify and understand what might be expected from the person holding a particular position. The terms *principal* and *superintendent*, for example, are precise job titles that evoke an understanding of the responsibilities and skills

needed for the two positions. Most interviewees expressed this need for clarity in their job titles and felt the term *inclusion facilitator* best represented their roles.

Frank did not even have a job title during the years he served as a de facto inclusion facilitator in a regional school district between 1991 and 1995! Nevertheless, he had firsthand experience with the evolutionary change from special education teacher to inclusion facilitator. He recalled

> *I saw myself as a change agent as well as someone who had to do a lot of training for families [and] general and special educators, as well as supervise paraprofessionals and support teams. I also saw myself as the liaison between families and schools and a link to the school board. The term "inclusion facilitator" was accurate for the day-to-day support that I provided to students and their teams.*

Frank understood the importance of creating clarity around the position and advocated that his job title be *inclusion facilitator* to meet the emergent literature and research in the field, as well as the daily, far-reaching responsibilities of the position.

Although Elaine and Catherine are comfortable with the term *inclusion facilitator*, Sandy expressed some unease about her current title as an inclusion coordinator because she wondered if it inaccurately related to the concept of an inclusion program. She cautioned,

> *[The term inclusion coordinator] is an oxymoron. When you indicate that someone is an inclusion coordinator and attached to a specific program, this is in direct conflict with the effort to include all students in age-appropriate typical grades and classes.*

Sandy believes that the language people use has an impact on the way people view teachers' responsibilities. She pointed out,

> *Long ago when these positions were conceived, we were bringing students back [from out-of-district placements] so it was our job to "include" children who were never in the building. I think we are way beyond that, and it makes sense to revisit the title.*

Frank also warned about viewing the title as a panacea. He noted,

> *I think the inclusion facilitator title is adequate, but you can't put too much into titles. I would love for the day to*

come when we didn't need the title. If we truly realize the goals of best practices in [inclusive] education, we can all become teachers and get rid of specialized titles.

This sentiment reflects an understanding posited throughout this book: An inclusion facilitator role is the "next-best thing" in the educational frontier, but the ultimate goal is for schools to include all students in age-appropriate general education settings naturally.

From Classroom Teacher to Facilitator of Supports Through Team Collaboration

Stainback and Stainback (1996), Vandercook and York (1990), Thousand and Villa (2000), Weiner (2002), and others concurred that a major key to the success of inclusion is the involvement of students, teachers, specialists, administrators, parents, and community members, all working together in collaboration. Villa, Thousand, Paolucci-Whitcomb, and Nevin (1990) proposed that "the very process of engaging in collaborative teamwork can facilitate the invention of a new paradigm of collaboration. The process of collaboration requires continuous adaptation in order to make room for multiple perspectives" (p. 279).

The teaming process exists within schools through a variety of formal structures such as site-based management and decision-making teams, reflective practice groups or study circles, curriculum committees, grade-level teams combining special and general educators, and student-specific teams. Individuals with diverse knowledge, skills, and backgrounds come together to develop common district policies, norms of classroom practice, and student-specific solutions.

For Frank, the change from a classroom teacher to a facilitator of supports and team collaboration was not easy, but he realized that collaboration among families, schools, general education, and special education was essential.

"The concept of teaming and working together is critical to student success," he stated emphatically. He continued, "[When we first started inclusion in our district] nobody had much information that was very helpful in terms of figuring it out in the classroom." Frank also found the change to be difficult around the area of service delivery because many of the related-services providers took students out of the classroom (Giangreco, Reid, Dennis, & Edelman, 2000). Frank also faced issues surrounding technology during his

role transition—ranging from getting information about what was available to actually using it to support students with complex needs.

Sandy's educational background in elementary and special education did not include any crossover courses. She recalled,

> *I didn't have any training in my undergraduate or master's program about working with other adults and the importance of collaboration, and I think that is huge. In my training you addressed the disability—you didn't accommodate to the learning environment, and you certainly didn't learn to work as a member of a team to address the opportunities and challenges of educating students with disabilities in general education.*

Elaine's transition has been a gradual one. She added,

> *You can't go in the first year and make tremendous waves. You have to go in and make changes gradually. The challenge is to accept the reality of where the school is philosophically and set your sight on small successes to build on. It was important to build the team concept by getting to know people, their personalities, their mission, and what was important to them and then pulling them all together.*

Advocacy and Schoolwide Leadership

Inclusion facilitators are teachers who emerged within the larger context of teaching for social justice, in which teaching is viewed as a moral profession requiring skills of change agentry and leadership rather than those of a mere technician (Fullan, 1993). Elaine, Sandy, Catherine, and Frank all portray the characteristics of teacher, advocate, organizer, and leader in their roles. Dedication, experience, and self-taught skills have worked for them, but each acknowledged the need for preservice preparation and professional development that provide current and new educators with leadership and advocacy skills.

"I was nervous as hell when I first started because I didn't know if I could do it," Frank confessed, explaining that there were few workshops on inclusive education when he began working as a de facto inclusion facilitator.

> *What I had in my favor is that I was really open and committed and hard working. I think what made me successful*

in the role is that I was able to move people to support what
I was doing.

Frank listened and tried not to judge, made sure to tell people that he did not have all of the answers, and promised to work with them to help them figure things out. He continued, "Being hands-on in the classroom made a big difference. When I went to school to learn to be a teacher, there was nothing to prepare me for the role of inclusion facilitator."

Frank's biggest challenge during his role transition was the pervasive attitude that inclusion "can't work for all kids." He felt that he had to convince and show people that good education means supporting all kids in general education classes and maintaining high expectations, regardless of a student's unique characteristics. According to Frank, special education perpetuates the myth that some kids can benefit from being in the mainstream and some kids cannot. He observed,

In many ways I felt like an advocate for the student and a
teacher for the adults. Every part of the education system
contradicts fully supporting all students and much of the
time it [the decision about who was included and who
wasn't] was pretty arbitrary. This was a constant challenge.

Frank tackled the problem by developing his own leadership skills in order to advocate for necessary changes.

"I learned this role by the seat of my pants," Sandy concurred. She felt she was personally and professionally in the mindset to work as an inclusion facilitator well before there was an emphasis on including students with significant disabilities in general education. When she had worked in a self-contained program for preschoolers, there had been a child care center nearby for children without disabilities. Even then—27 years ago—she found herself asking why these children were separated when they could learn from one another. "What prepared me for this role was growing up in the field and being drawn to staff development that was geared toward information about inclusion." Sandy took advantage of as many professional development opportunities as possible, and similar to Frank, she had to forge her knowledge and experience of advocacy and leadership through self-directed professional development.

Although many inclusion facilitators would never describe themselves as leaders or advocates, Catherine observed, "In fact that is exactly what I need to be to facilitate positive outcomes for students with disabilities in general education classes." It is not

unusual for her to be in the position of justifying or advocating for the presence of a student with significant disabilities in ordinary routines. Catherine mused,

> *I used to think this was not my role. But if it is not my role, then it becomes the primary responsibility of the parent. I have seen too many families work too hard to make sure their children with disabilities get a quality general education with supports. It shouldn't all be on the parents. This is my responsibility, too.*

Liaison Between School, Home, and the Community

Strong relationships between schools, families, and the larger community offer opportunities for greater connectedness; an expanded understanding of resources available to support students, families, and schools; and an increased likelihood for successful transitions between school and home and ultimately to adult life. Relationships of mutual support are critical across organizations in community life and, according to Michael Peterson, Co-Founder of the Whole Schooling Consortium, "Our challenge is to create and support community—the common bond holding us together, which, in turn is supported and maintained by our relationships" (1996, p. 292). Because schools and families are essential to the fabric of community life, they must forge a partnership that consists of a shared understanding of what constitutes successful outcomes for all students and shared resources necessary to achieve those outcomes.

This concept implies that inclusion facilitators need to be knowledgeable about the variety of agencies affecting the lives of students and their families. Lourie, Katz-Levy, and Stroul (1996) described an approach called *unconditional care* that results in policies that seek to create an inclusive entrance into services and prevent discharge or exclusion from what is naturally available to students without disabilities. This approach also requires that students with disabilities receive access to specialized supports and services to meet their unique concerns. Although comprehensive systems of care, also known as the *wrap-around approach*, were initiated to respond to the needs of children and youth with emotional and behavioral disabilities, there is widespread agreement that this process benefits all children and their families with complex needs, regardless of their disability label. The wrap-around systems of care approach acknowledges that there are many service providers in the

lives of some families, and thus all service providers need to work collaboratively to address the family's needs within their home, neighborhood school, and local community.

Unfortunately, recognition of the importance of wrap-around services together with the skills to bring services to the family has not traditionally been taught in preservice educational or professional development programs. Catherine, for example, wished she had learned more about community resources so that she could better support families beyond the school day. She lamented, "It would have been good to have a better understanding of how to access these resources to solve the challenges that students and families face at home that end up impacting their time at school."

Elaine regretted that she wasn't trained to work with parents to understand what is important to them or how to negotiate win-win solutions between the parents and the school. Some parents, she said, want their children to learn to read and write and support their inclusion in general education core curriculum, but others appear to value social relationships for their children above all else. Still others are concerned with having their children learn basic functional skills and do not see the importance of having their children attend academic classes such as social studies and science. She recalled,

> In the beginning, parents looked at me like I had two heads when we stated that there was value to some of the [general] education classes that they might not have considered before. We needed to walk them through and show them how in the context of the class students could be working on functional skills and still get the benefit of [general] classes.

Catherine described her experiences as a liaison to illustrate how important home and community supports are to educational outcomes. She revealed, "So often out-of-district placements happen when there are [challenging] issues at home. Schools seem to be unable or unwilling to be flexible and to get involved to be a change agent around these issues." She noted that it is often difficult for students who require significant physical and/or behavioral supports to receive those supports at home when a family is not able to provide them. Without these accommodations provided at home, Catherine said, it has also been difficult to ensure these students' success at school. Her role as a liaison requires that she be aware of what resources exist in the community and assume responsibility for coordinating these resources.

Catherine offered one example:

A student I support received counseling services, special education services, speech-language [services], and hearing services at school. Her parents also took her to a local clinic in which she received yet another round of therapy. There was no coordination between school and home community services and, unbeknownst to everyone, the school and clinic were working on different goals! As the liaison, I was able to bring this to everyone's attention. Once the family understood that the school was providing those services throughout the course of the day, they were comfortable dropping the after-school therapy and focusing on getting their daughter included in age-appropriate extracurricular activities.

In order to create a wrap-around system of care that coordinates consistent and effective services, an inclusion facilitator's role has evolved to include the responsibility of acting as a liaison between the school, home, and community. Chapter 7 describes in detail an inclusion facilitator's role as an information and community resource broker.

Creating Sustainability

The interviewees provided many recommendations about what it takes to sustain inclusive learning environments. According to Elaine, Sandy, Catherine, and Frank, maintaining an inclusive learning environment requires

- Teachers who are flexible, innovative, and willing to put inclusive ideas into practice

- Teachers who invite inclusion facilitators to share their grade-level planning time and welcome inclusion facilitators and others into their classrooms

- Teachers who see all of the students in their class as their students and not merely visitors

- Teachers and other team members who sustain their own energy and commitment to avoid burnout

- Schools that offer professional development that supports inclusive strategies

- Schools that expect teachers to work as a team and to maintain high expectations for all students

- Schools that emphasize building the trust level among students, parents, and all team members, including the principal and assistant principal

SUSTAINING THE INCLUSION FACILITATOR'S ENERGY AND COMMITMENT BY CELEBRATING SUCCESS

Although the role evolution for inclusion facilitators has not always been easy, celebrating successes is a positive way to maintain one's energy and commitment. Catherine, Elaine, Sandy, and Frank all had stories of celebration that inspire and illustrate their true dedication to inclusive schools.

Catherine revels in the little successes rather than focusing on what has not worked so well. For one of her students with significant disabilities, her team has been able to predict potential challenges and clear expectations ahead of time so that behavioral crises do not occur. As a result of Catherine's leadership, this student has more friends and participates more actively in classroom activities. Another of her students, who has a label of autism spectrum disorder, used to choose picture books to look at rather than books with text to read. Catherine suggested that the paraprofessional and teacher preview the class books and identify questions about the plot and characters that would pique the student's interest. Now, this student is reading text that is grade level and above. Catherine hypothesized,

> He needed a start and a finish to the chapter book, and the comprehension questions gave him a structure and the motivation to engage in reading. People never expected that he could do this, but we figured out what makes him click as a reader, and people could see that he is smart and capable. Before we tried this strategy, no one was sure what he was getting out of it.

Elaine considers the milestones of graduation and the completion of driver's education—activities that some thought particular students would either never have as a goal or be able to achieve—as markers of success. One student who experienced significant behavioral and cognitive disabilities moved into Elaine's former school district from an out-of-state school. In his old school, he was in a self-contained classroom and spent the day working on supposedly functional skills such as sorting, identifying colors, and counting. Elaine recalled with pride,

*He is now in tenth grade, attending all general education
classes, and being provided with paraprofessional support.
He is working on gaining the credits required to graduate.
His parents never thought they would see that day, and the
whole school community is recognizing and learning from
the success. This was a kid who was typically sent home
from school because of his behaviors. I get misty eyed when
I think of him.*

Frank celebrated the close relationships that developed among
peers, as well as the creation of teams including students, families,
and teachers who shared the same goals. His work with one student
led to that student's involvement in the school's booster club and
Key Club as well as a summer job alongside another classmate who
did not have disabilities. "It made it feel as though you could
accomplish anything!" Frank marveled.

Frank also shared the story of Molly's inclusion into a fifth-
grade classroom as one of his most challenging, yet satisfying,
examples of successful inclusion.

Molly's Story

When Frank met Molly and her parents, she was a resident of a pediatric
nursing home, having been placed there by the school district when she
was 3 years old. When Molly was approaching her tenth birthday, she
and the other students who lived at the facility spent their school day in
a small educational program located at the site, engaged in personal care
routines, therapy, and preschool activities.

In his role as the elementary school inclusion facilitator, Frank vis-
ited Molly a few times a year to ensure that her IEP was being imple-
mented as written, to check on her progress, and to participate in end-of-
year program review meetings. He had become convinced that her local
school could provide an appropriate and rich education for Molly, and
he made it a personal goal to return her to the district. He knew that even
if Molly stayed in the pediatric nursing home, he would be busy facili-
tating successful inclusion for the other seven students on his caseload.
Yet, each time he visited her, he knew that he had to advocate for her
return as well.

For almost 2 years, Frank broached the idea of moving Molly back to
the district with her parents, the district's special education director, and
the principal of Molly's neighborhood school, but none of them believed
the idea was feasible. Rather than criticize them for their difference of

opinion, he acknowledged their concerns and worked to address each and every one in a respectful way.

Then, during Molly's fourth-grade year, the opportunity arose for Frank's school district to be part of the IOD's Statewide Systems Change Project that was focused on building local capacity to educate students with significant disabilities in their home schools. He asked Molly's parents, a team of people from her school, and the family support coordinator from the local developmental service agency if they would like to attend a weeklong summer institute sponsored by the project and then participate in a year's worth of training and technical assistance to help plan Molly's successful transition. The team agreed, as long as members could have the option of making the final decision about Molly's educational program and placement based on her individual needs. Frank was optimistic that everyone's concerns could be addressed, and he welcomed the challenge.

The team did attend the summer institute and left sharing Frank's passion about inclusive education. Although members still had many concerns and questions that needed to be resolved before they would be ready to bring Molly back to the district, their attitude had shifted from "why?" to "how?"

Following the summer institute, Frank and Molly's team met to develop a 12-month plan for Molly's transition that included numerous training opportunities for school staff, Molly's team members, and her future classmates. The team's goal was for Molly to enter fifth grade the following school year. The team decided to visit Molly at the facility, review her IEP, and see how her educational goals and health concerns were being met.

On the way home from the visit, their van buzzed with conversation. The team was unimpressed by the content of Molly's educational program. Even though they weren't really sure about Molly's capacity to learn, they felt sure that their fifth-grade curriculum and classroom would provide a much richer learning environment in which Molly could reach her potential.

Frank was convinced that Molly had greater abilities than she was able to demonstrate. She didn't have a way to communicate but clearly demonstrated an interest in the people and activities around her. Frank remarked that he wouldn't like anyone to try to guess how smart he was if he could not move or speak, and he vowed that he would never make any predictions about what Molly could or could not learn.

Molly's health concerns were substantial and the school, Molly's parents, and team wanted to ensure Molly's safe return to the district by setting standards for her health support. The team determined that Molly

would need the services of a paraprofessional with training in cardiopulmonary resuscitation, catheter maintenance, suctioning, and feeding Molly through her gastrointestinal tube. The team's goal was to hire an experienced special education paraprofessional who had Certified Nursing Assistant licensure. Together with the school nurse and occupational therapist, Frank wrote a job description for this person and began interviews about 3 months before the end of that school year.

Frank also worked extensively with Molly's parents and the local developmental service agency to plan for the home supports Molly would need. New Hampshire had recently approved a Medicaid waiver program to provide in-home supports for children with significant health care concerns that was not tied to family income. The family determined that there were architectural barriers that would have to be addressed and that specialized medical equipment and the services of a personal care attendant for several hours of the day were needed to ensure Molly's safety and their family's overall stability. Frank was instrumental in helping the family negotiate the paperwork and regulatory hurdles to obtain those services.

Once the team developed a detailed health and safety plan, it met regularly to discuss how Molly might participate in the fifth-grade classroom and curriculum. Frank spent many hours observing in the fifth-grade class, noting the room's physical layout, the teacher's instructional methods, and the children's interactions. Because Frank had worked with children with significant disabilities for many years, he had developed a file drawer full of lesson plans and creative projects for other students, and the team slowly began to have a vision of how Molly could participate in typical fifth-grade lessons at the same time she was learning the skills on her IEP.

Frank knew Molly's communication barriers would make it difficult to include her in the academic life of the classroom and arranged for her to be assessed by an augmentative communication team from the state's assistive technology center. The team determined that a single-switch communication device would give Molly a way to participate in lessons and that the process of expanding her communication abilities would be a long-term goal.

Every time Frank met with Molly's prospective team, one member or another raised new concerns that had to be addressed. Frank's reassuring manner, his ability to coach the team to voice its concerns, and his years of experience built a real sense of trust within the team. Frank knew that this effort would be successful only if the team was an effective working group, so he developed close relationships with each team member in school and through occasional end-of-the-week get-togethers.

Assisted by Molly's mother, Frank conducted two miniworkshops for the outgoing fourth-grade students because he knew that they would be key in accepting Molly as a valued member of social life in the classroom and school community. Molly's mom shared a scrapbook about Molly with the students. Frank talked openly about her disabilities, but emphasized what Molly and the other students had in common. Toward the end of the school year, the classroom teacher had the students write short notes to Molly telling her all about themselves and their school.

Frank was careful to create a picture of Molly that emphasized her gifts and personality without asking for the students' pity. He knew that some students would take on the role of Molly's helpers, but he talked honestly with them about the need for Molly to feel as if she had something to offer them as well.

As the time for Molly's transition grew nearer, Frank coordinated a half-day visit to the school. Rather than making the event a formal occasion, he and the classroom teacher picked a day during the last month of school when the annual school fair was taking place. Frank, Molly, and her mom sat at a picnic table and introduced Molly to the many children who shyly approached them to find out about the girl whom they had come to know through an occasional videotape or letter.

The transition planning process did not always go as planned. When the fifth-grade teacher who had been part of the planning process announced that she would be going on maternity leave for the first 3 months of the following school year, Frank and the principal worked together to identify another fifth-grade teacher in the building who was open to having Molly in his or her classroom. At first, this change in plans seemed to present an almost insurmountable barrier as the team had invested so much energy in the first teacher. When the team found out that the new teacher had just recently attended a conference on multiple intelligences and was planning to design several multiple intelligences–based units, they felt as if the unplanned change might have unexpected benefits for Molly (Armstrong, 2000).

This description of Molly's transition planning makes it appear as if everything went smoothly, the team members never had a disagreement, and that even the difficulties worked themselves out magically. The reality is far from that. But Frank's disposition and unshakable belief in inclusion provided a sense of steady leadership to the team so that the inevitable problems that arose were addressed in an honest and systematic way. Frank is a good example of the type of professional who holds the beliefs and has the disposition to be a successful inclusion facilitator (see Table 1.1).

Table 1.1.   Beliefs and personality traits of successful inclusion facilitators

Beliefs	Personality traits
Families are central to children's lives.	Committed
Good teaching is good teaching.	Flexible and open-minded
Every person has inherent value.	Collaborative
Every person has competence.	Respectful of others' viewpoints
Diversity enhances community.	Creative
	Friendly
	Optimistic

What about Molly? Her first year in public school was marked by joyous occasions, such as her participation in the holiday concert and her emerging literacy skills. There were also some frustrating moments when people were unsure of what she was communicating or when IEP team meetings were cancelled due to reasons beyond the members' control. But all in all, Molly seemed happy, she was using her communication device, her parents were more optimistic about Molly's future than they had ever been before, and the school moved one step closer to being a true, inclusive community of learners.

CONCLUSION

Although the job title of inclusion facilitator is meant to describe a laudable goal—supporting all students to be successful in the general education classroom and school community—the word *inclusion* has taken on a negative connotation for some people. Language has the power to unite or divide. It can move people forward or backward in the effort to achieve promising practices for students with disabilities. Perhaps the job title of inclusion facilitator is just the "next-best thing," and what really matters most is that all educators promote a vision of an inclusive and just society, hold high expectations for every student, and use effective teaching strategies that result in positive academic and relational outcomes for all students, including those with significant disabilities.

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2

Ten Promising Practices in Inclusive Education

The Inclusion Facilitator's Guide for Action

Cheryl M. Jorgensen

The Education for All Handicapped Children Act of 1975 (PL 94-142) first guaranteed universal access to free appropriate public education for students with disabilities through mandated procedures and processes. Although the authors of that law presumably believed that these regulated procedures would result in positive educational and life outcomes for students with disabilities, those outcomes were not specified, nor was accountability expected. With each successive reauthorization of the law, however, there has been an increased emphasis on both results and accountability. Committee reports generated during the reauthorization of the Individuals with Disabilities Education Act Amendments of 1997 (IDEA 1997, PL 105-17) stated that "the primary purpose of all these amendments is to go beyond mere access to the schools and secure for every child an education that actually yields successful education results" (Gilhool, 1998, p. 5). To secure these results, legal provisions are now in place (e.g. IDEA 1997; Individuals with Disabilities Education Improvement Act of 2004 [IDEA 2004, PL 108-446]) to ensure that children with disabilities make progress within the general education curriculum based on learning objectives that are, to the maximum extent appropriate, the same for all children. States must not only measure the learning results of children with disabilities; they must also publish them in the same way as they publish results for

children without disabilities. IDEA 1997 also includes provisions that all school districts must disseminate and implement "promising educational practices—systems of teaching and learning that have a record of success" (Gilhool, 1998, p. 5).

Because Congress did not specify in much detail the practices that qualify as "promising," practitioners must look to the professional literature for guidance. This chapter describes 10 values and research-based promising practices that, combined with characteristics typically associated with a good general education, define a quality education for students with significant disabilities (Jorgensen, McSheehan, & Sonnenmeier, 2002a, 2002b). These include

1. Policies and practices based on the least dangerous assumption and high expectations

2. Membership and full participation in general education classes

3. Family and school partnerships

4. Collaborative teaming

5. Planning and implementing of supports

6. Appropriate augmentative and alternative communication (AAC)

7. Friendship facilitation

8. General and special education reform

9. Encouragement of self-determination

10. Person-centered planning

Each section in this chapter defines a promising practice, offers an example of its use, and describes both positive and negative exemplars. It is incumbent on an inclusion facilitator to understand the rationale for each promising practice and to use his or her leadership, teaching, and administrative skills to embed them into every student's educational program.

POLICIES AND PRACTICES BASED ON THE LEAST DANGEROUS ASSUMPTION AND HIGH EXPECTATIONS

Imagine that the following description applies to a student who has a label of severe mental retardation. Her academic records contain the results of intelligence tests and adaptive behavioral evaluations that assign her an IQ score of 36 and a developmental age of 18–24

months. She experiences seizures and sensory impairments, and evaluators believe that she lacks intentional movement. This student has no conventional way of communicating and does not appear able to read. Most people assume that she does not know much and cannot learn much.

How would this information affect decisions about this student's educational program? Should it be assumed that these test results and labels are accurate representations of her current abilities and future learning potential? Alternatively, is there another way of thinking about this student that can lead to the creation of an educational program based on expectations that are very different from her reported test results?

Let us consider two completely different approaches to this dilemma. In the first scenario, we assume that the student is not "smart"—that she does, in fact, have *mental retardation*, defined as significantly subnormal intelligence and ability to learn. How might she be treated? First, we would not try to teach her to read. Second, we would speak to her in language more appropriate to a very young child. Third, this student would probably spend her educational career being taught functional skills such as dressing, eating, shopping, cooking, and cleaning. In most states, she would be educated in a separate classroom alongside other students who also have significant disabilities. If she did join the rest of the student body, it might only be during lunch or perhaps a class such as music or art. If we did address her communication skills, the vocabulary and messages that we would make available to her would correspond to our assessment of her intelligence and relate to the functional skills we were teaching her. We would not encourage her to participate in the school's social life because we would assume that her disabilities were too significant for her to enjoy the same activities as her classmates; interactions between her and other students would be limited to their volunteering to be her peer buddy or helper. Perhaps she might participate in Special Olympics a couple of times a year.

As she approached the end of her school career, the possibility of her attending college would not even be considered. Instead, we would plan for her to move into a group home, attend a day habilitation program or work in a sheltered environment, and pursue specialized leisure and recreational opportunities with other adults who have similar disabilities. We would not expect her to have opinions about world events, her future, love, or anything else considered to be complex.

Now, imagine that it is several years in the future. A remarkable discovery has made it possible to determine without question how smart someone is through a simple brain scan. The brain scan results show, surprisingly, that this young woman has an IQ score of 120. She does not have mental retardation. What have been the consequences of our original assumption of mental retardation being wrong? Has any harm been done?

Next, consider another scenario involving the same young woman with the same history of intelligence tests that indicate she has mental retardation. She is still unable to tell us much about what she is thinking and learning, or what she knows because she does not have an effective means to communicate. But in this second scenario, we operate from a different set of assumptions. This time, we treat her as if she is "smart" because we distrust the validity of her test results in light of her communication and movement difficulties. We enroll her in general academic classes, try to teach her to read, and support her with adapted materials and instructional supports. We talk with her about current events and make sure that her AAC device includes words and concepts that are commensurate with someone who can think about current events, love, relationships, and her future. We offer postsecondary education as a graduation option in addition to the possibility of moving into an apartment, working at a real job, or traveling. We also assume that she is capable of, and interested in, making friends— both with and without disabilities.

Once again, many years in the future a new and more accurate brain scan is invented. This time when it is used, however, it shows that she has an IQ score of 40. What have been the consequences of our original assumption of intelligence that has now been proven wrong? Has any harm been done?

These scenarios illustrate the principle of the "least dangerous assumption" that was first described by Anne Donnellan. She proposed that when educational decisions must be made without conclusive information about a person's abilities or intelligence, we ought to work from the assumption that will have the least dangerous consequences should that assumption ever be proven wrong (Donnellan, 1984). Thus, for Donnellan, the least dangerous assumption when working with individuals with significant disabilities is to assume that they are competent because to do otherwise would result in fewer educational opportunities, omitted literacy instruction, a segregated education, and an adult life with fewer choices.

When Donnellan originally proposed the least dangerous assumption principle, few research studies showed that the abilities of people labeled as having mental retardation might be greater than suggested by traditional test results. Since the article was published in 1984, however, AAC, literacy, and special education literature has documented a growing number of examples in which students demonstrated unexpected literacy skills when they were held to high expectations, included in general education classrooms, and/or provided with adequate AAC and instructional supports (Biklen & Cardinal, 1997; Erickson, Koppenhaver, & Yoder, 2002; Erickson, Koppenhaver, Yoder, & Nance, 1997; Koppenhaver, Erickson, Harris, McLellan, Skotko, & Newton, 2001; Ryndak, Morrison, & Sommerstein, 1999).

How to Know It When You See It

When people do **not** assume that students with disabilities are competent and able to learn, educational programs have the following characteristics:

- Participation of students with disabilities in the general education curriculum focuses on learning access or functional skills rather than on acquiring ideas, content knowledge, and related literacy skills.

- Students with disabilities may not be included in general education classrooms, or if they are, they may participate in functional portions of instructional routines but not in the discussion of ideas or content knowledge; in many instances, they will be given different materials and resources than those given to the rest of the class.

- People converse with students with disabilities as if they are talking with a much younger child, and social and academic vocabularies are geared to students' perceived "developmental levels" or IQ scores as measured by traditional assessments.

- Students with disabilities are not supported to engage in social activities with same-age peers because those activities are deemed inappropriate or too advanced.

- Planning for the futures of students with disabilities does not typically include the choice of a postsecondary education; instead, career options are geared to lower-skilled jobs rather than to ones that require higher-order thinking or literacy skills.

When schools follow policies and practices based on the least dangerous assumption and high expectations, the following statements are true:

- "Person-first" language is used so that people say *students with autism*, not *autistic students.*

- Language that classifies students based on their functioning or developmental levels is not used; rather, descriptions of students focus on their abilities and needs.

- Annual goals on individualized education programs (IEPs) reflect content standards from the general education curriculum.

- Students with disabilities are seen as capable of learning; educators do not predict that certain students will *never* acquire certain knowledge or skills.

- People speak directly to students with disabilities rather than speaking to students through a buffer supplied by paraprofessionals or others.

- People use age-appropriate vocabulary, topics, and inflection when talking to students with disabilities.

- In order to respect privacy, staff members discuss the personal care, medical needs, and other sensitive issues of students with disabilities out of earshot from others and only with those people who genuinely need the information.

MEMBERSHIP AND FULL PARTICIPATION IN GENERAL EDUCATION CLASSES

The second promising practice in inclusive education is for all students with disabilities to be full-time members of general education classes. This practice defines the term *inclusion* (Stainback, Stainback, & Forest, 1989), and a look back in history illustrates how inclusion evolved in response to new research on outcomes and new attitudes toward diversity.

After the first U.S. special education law was passed in 1975, most students with significant disabilities were educated in separate, self-contained classrooms located in general education schools, in regional collaborative programs such as the Board of Cooperative Education Services (BOCES) in New York State, in private educational facilities, or in separate facilities operated by organizations such as Easter Seals.

By the late 1970s, *mainstreaming* had become popular, defined as students with disabilities visiting a general education class or activity such as circle time, art, music, or physical education, primarily for the purpose of socialization. When students were mainstreamed, they were still members of self-contained classrooms, where they received most of their academic instruction.

In the mid-1980s, the practice of *integration* evolved, where students with disabilities were placed in general education classes for part of the day (Calculator & Jorgensen, 1994). Students integrated into a general education classroom, it was thought, might learn skills such as communication or appropriate behavior, along with some of the content of the general education curriculum. Integrated students still received some academic instruction and related services outside of the general education class.

By the late 1980s, parents, researchers, and progressive educators had shifted the paradigm to *inclusion*, which assumes that students are full-time members of general education classes rather than visitors or part-time members. These students' educational programs are based within general education classrooms, and students are provided with the supports they need to ensure their success in that typical environment. The physical space, materials, instruction, and supports are universally accessible to all, not simply modified for some students. As author and community-builder John O'Brien has noted,

> It is simple to state the meaning of inclusion but difficult to set and hold it in place as a context for goal setting and problem solving. Because inclusion happens when communities shift their boundaries and practices to make room for and support people with disabilities, its advocates have more to do than simply change the practice of special educators or human services providers. (2000, p. xii)

Benefits of General Education Class Membership and Full Participation

National experts and family advocates encourage placing students with significant disabilities in inclusive settings (Biklen, Ferguson, & Ford, 1989; Brown et al., 1989; Giangreco, Cloninger, & Iverson, 2000; Lipsky & Gartner, 1989; Stainback & Stainback, 1990; Villa, Thousand, Stainback, & Stainback, 1993). A variety of rationales support such inclusive placements.

Students with Significant Disabilities Learn More in Inclusive Classrooms   A metareview of research on inclusion outcomes

indicated that students with disabilities learn more social skills, develop closer relationships with peers who are typically developing, acquire a greater repertoire of functional skills, and develop better communication skills in inclusive environments than in segregated settings (McGregor & Vogelsberg, 1999).

Students who are well supported in general education classrooms also learn the "hidden curriculum," consisting of expectations, routines, behaviors, relationships, and culture, which is significantly different from that of the special education classroom (Apple, 1979).

Students with Significant Disabilities Can Learn Academic Curriculum Content

The reauthorization of the Individuals with Disabilities Education Act (IDEA) of 1990 (PL 101-476) in 1997 introduced into federal law a requirement that all students with disabilities have access to the general education curriculum, reflecting the growing body of research suggesting that many students previously thought to be unable to learn academics are, in fact, capable of developing literacy and other content knowledge (Biklen & Cardinal, 1997; Erickson et al., 1997; Erickson et al., 2002; Koppenhaver et al., 2001; Ryndak et al., 1999).

Mindful of this research that casts doubt on previously accepted definitions of disability and mental retardation, J. David Smith, Provost and Senior Vice Chancellor at the University of Virginia's College at Wise proposed that the Council on Exceptional Children (CEC) eliminate the phrase "mental retardation" from the title of its Mental Retardation and Developmental Disabilities division. He argued that the term is "scientifically worthless and socially harmful" (Smith, 2002, p. 7). This debate about terminology is related to a growing belief in the field of developmental disabilities that schools should apply the least dangerous assumption about students' potential literacy capabilities and provide all students with access to the general education curriculum and its associated vocabulary. IEP teams should not try to determine a student's intelligence or competence until that student has had access to the general education curriculum and consistent and quality instructional and other supports, and until educators have helped the student to develop an effective means of communication (McSheehan, Sonnenmeier, & Jorgensen, 2002).

Functional Skills Can Be Taught within the Context of Regular Routines and Lessons

Important functional skills can

be taught within the context of regular routines and lessons in a general education class and throughout the school community without segregating students. Students should learn these skills in the same contexts and environments as classmates without disabilities (Tashie, Jorgensen, Shapiro-Barnard, Martin, & Schuh, 1996). During the late 1970s and 1980s, the field of special education for students with significant disabilities shifted from a developmental to a functional model. Practitioners recognized that adherence to a purely developmental model of education, in which students were required to pass certain developmental milestones (e.g., identification of shapes) before moving on to higher level skills (e.g., letter identification), locked students into a "pre- means never" mode. Many students often left school at age 21 still working on stacking, color identification, sorting, and so forth (Brown, Branson, Hamre-Nietupski, Pumpian, Certo, & Gruenewald, 1979). In contrast, the functional skills model suggested that all students could learn functional skills in natural contexts, given the right instruction and supports, regardless of their measured developmental levels.

In the late 1980s, another shift occurred in what constituted best practices for students with significant disabilities. Researchers, parents, and educators began to understand that students with significant disabilities need a well-balanced educational experience, not just a functional one. Students need instruction in core academic skills (e.g., reading, writing, using a computer); exposure to content knowledge; and the opportunity to develop dispositions and skills related to responsible citizenship such as effective communication, cooperation, persistence, and work-related skills. Furthermore, research on students enrolled in functional skills curricula showed that although they did, in fact, learn valuable self-help and community-referenced skills in those programs, their social lives were barren: They spent most of their time with paid caregivers and other people with significant disabilities, and they missed out on valuable academic and life-lessons by being out of the school building during the day.

Educators became more sophisticated in their understanding of what functional skills truly contributed to a student's or adult's productive membership in the community. Setting the table, making a bed, and doing laundry came to be seen as less important than reading a newspaper, voting in an election, supervising one's own personal care attendant, remembering a friend's birthday with a card, and finding a ride to a social event (Shapiro-Barnard et al., 1996).

Classmates' Education Is Not Adversely Affected by the Presence of Students with Disabilities   A variety of studies have demonstrated that 1) the development of preschool children who are typically developing does not decelerate when a diverse array of children are in the classroom (Odom, Deklyen, & Jenkins, 1984); 2) academic achievement of elementary age students is not compromised by the presence of students with disabilities in the classroom (Sharpe, York, & Knight, 1994); 3) there is no difference in the amount of attention teachers give to students without disabilities in inclusive classrooms (Hollowood, Salisbury, Rainforth, & Palombaro, 1994/1995); and 4) students without disabilities do not model or copy inappropriate behavior from students with disabilities (Staub, Schwartz, Gallucci, & Peck, 1994).

Diversity Enhances Communities   Schools that value collaboration and diversity create classrooms in which all students are valued for their unique characteristics and talents (Sapon-Shevin, 1998). When students with disabilities are separated from their classmates who are typically developing, all students come to understand that people who are different do not belong. Students in the early elementary grades begin to adopt this attitude when their classmates with disabilities come and go throughout the day to receive services outside the general classroom.

In a landmark study by Schnorr (1990), first-grade students were interviewed on their perceptions of a student with Down syndrome who attended their class on a part-time basis. Most first-grade students did not consider this student to be a member of their class, even though he had a desk and other membership symbols (e.g., cubby) in the room. They saw him as younger and smaller than they were, even though he was the same age and size. They also viewed him as coming to school to play while they worked on academics. Finally, they did not see him as socializing with anyone in their class. This research on a student who was included part-time in a general education classroom has worrisome implications for the development of social relationships between students with and without disabilities and for children's evolving views on diversity.

In studies of fully inclusive classrooms and schools, students who are typically developing report an increase in their own self-concept, growth in social cognition, and reduced fear of human differences (Peck, Donaldson, & Pezzoli, 1990). Jorgensen's research conducted in a fully inclusive high school found that students who are typically developing viewed their classmates with significant

disabilities as being "just one of the guys" and "just like us" (Jorgensen, Mroczka, & Williams, 1998).

"Value-Added" Contribution Exists for a Diverse School Community   Although a growing body of research demonstrates the benefits of inclusive education for students, their peers, and families, some research studies suggest that the education of both students and their peers has been compromised rather than enhanced by inclusion (Baker & Zigmond, 1995). These studies postulate that the lack of adequate resources has negatively affected teachers' attitudes toward both special education and inclusion.

Fisher and colleagues offer an alternate paradigm that the presence of students with disabilities offers an added value to a classroom and a school. They suggest that the sum total of the resources that flow into an inclusive environment will "turn out to be 'in the black' rather than 'in the red'" (Fisher, Sax, Rodifer, & Pumpian, 1999, p. 256). These researchers studied an inclusive urban high school in which all students—including 34 students with significant disabilities—were included in general education classes. Semistructured interviews were conducted with 23 members of the teaching staff. Results from qualitative analysis of the interviews indicated that teachers who had taught students with significant disabilities in their classes increased their tolerance and understanding of human differences. Teachers also reported that inclusive education encouraged them to view all of their students in new and individualized ways and increased their understanding of individual learning style differences and the need for differentiated instruction. Finally, this study and others have found that inclusion provides opportunities for teachers to introduce broader "equity" topics into curriculum areas such as science, American government, literature, child development, and even technology.

When Students with Disabilities Are Taught Well, All Students Are Taught Better   When students with disabilities are educated outside the general classroom—thereby decreasing the classroom's diversity—teachers become even less willing and able to teach diverse students. Conversely, teachers who feel confident about their ability to teach students with disabilities report that they feel more competent to teach a wider variety of students (Giangreco, Dennis, Cloninger, Edelman, & Schattman, 1993).

Laws Such as IDEA Put a Presumptive Value on Inclusive Placement   With each successive reauthorization of IDEA, education in

the general classroom has been given a greater value. IDEA 1997 stated that to the maximum extent appropriate, children with disabilities are educated with children who are not disabled. Furthermore, the law declares that school districts cannot use a lack of adequate personnel or resources or the challenge of coordinating services as excuses for failing to make a free appropriate public education in the least-restrictive environment available to students with disabilities.

Kluth, Villa, and Thousand (2002) identified three common misunderstandings about inclusive placement decisions. First, parents and schools sometimes think they need to justify why a student should be included, when in fact the opposite is true. Denying a student access to inclusion is only acceptable in rare instances. IDEA 1997 stated that students with disabilities may be removed from the regular education environment 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. If schools can successfully educate a student with disabilities in general education settings with peers who do not have disabilities, then the student's school must provide that experience.

The second misunderstanding about inclusive placement is the belief that students need to be able to keep up with the curriculum in order to benefit from inclusion. According to Kluth et al.,

> Students with disabilities . . . do not need to keep up with students without disabilities to be educated in inclusive classrooms; they do not need to engage in the curriculum in the same way that students without disabilities do; and they do not need to practice the same skills that students without disabilities practice. Learners need not fulfill any prerequisites to participate in inclusive classrooms. (2002, p. 26)

Finally, some courts have challenged the assignment of students to disability-specific programs and schools. In *Roncker v. Walter*, the judge stated,

> It is not enough for a district to simply claim that a segregated program is superior. In a case where the segregated facility is considered superior, the court should determine whether the services that make the placement superior could be feasibly provided in a non-segregated setting. If they can, the placement in the segregated setting would be inappropriate under [IDEA]. (1983, p. 1063)

Negative Effects Are Associated with Separating Students from their Peers   Researchers and others have found certain negative consequences of educating students with significant disabilities in separate classes, including 1) poorer quality IEPs (Hunt & Farron-

Davis, 1992); 2) lack of generalization of learning to environments outside of the separate classroom (Stokes & Baer, 1977); 3) disrupted opportunities for sustained interactions and social relationships with students without disabilities (Strully & Strully, 1992); 4) a decrease in the confidence that general class teachers have for teaching diverse learners (Giangreco et al., 1993); and 5) absence of appropriate behavior and role models.

How to Know It When You See It

When schools are **not** committed to the true meaning of inclusion, or actively work against it, educational practices have the following characteristics:

- The establishment of an inclusion program, an inclusion classroom, and inclusion students; an inclusive school does not need to specify which classrooms are inclusive or which students are included.

- Separate classrooms and programs are reserved for students with significant disabilities.

- Disproportionate numbers of students with disabilities are in certain classrooms.

- A lack of ownership exists on the part of general education teachers for students with disabilities rather than collaborative teaming to benefit all students.

- Students with disabilities go out into the community to learn in groups that do not include students without disabilities.

- Students with disabilities participate in only a limited number of extracurricular activities, such as the Special Olympics.

- Students with disabilities are always on the receiving end of help (e.g., special buddy programs) rather than engaging in reciprocal relationships that benefit both students with and those without disabilities.

- Students with disabilities have no social life outside of school.

When schools truly understand inclusion and the meaning of full membership and participation, the following statements are true:

- Students with disabilities are members of age-appropriate general education classes.

- Students with disabilities attend the same school that they would be attending if they did not have disabilities.
- Students with disabilities progress through grade levels according to the same pattern as students without disabilities.
- Students with disabilities participate in the graduation ceremony at the same average age as their classmates without disabilities.
- Students with disabilities receive a diploma when they are discharged from special education.
- Students with disabilities learn in outside-of-school, age-appropriate, and inclusive environments after the age of 18 (before they receive their high school diploma or are discharged from special education programs).
- Students with disabilities are not removed from general education classes for academic instruction.
- Related services are delivered to students with disabilities primarily through consultation in the classroom and in typical, inclusive environments.
- No places or programs in the school are reserved just for the use of students with disabilities.
- Students with disabilities comprise about 12% of the enrollment (i.e., a natural proportion) in classes, courses, clubs, and extracurricular activities.
- The names of students with disabilities are included on all class lists, job lists, and other groups listed on blackboards and bulletin boards.
- Instructional materials are universally accessible to all students.
- Students with disabilities participate in classroom and school routines in typical locations, such as saying the Pledge of Allegiance, performing jobs and errands, and eating lunch in the cafeteria.
- Students with disabilities ride the same school buses as their classmates without disabilities.
- Students with disabilities participate in classroom instruction in similar ways as do students without disabilities.
- Students with disabilities participate in school plays, field trips, and community service activities.

Schools are physically accessible to all students.

Schools accommodate all students' sensory concerns.

:AMILY AND SCHOOL PARTNERSHIPS

[he third promising practice in educational programs for students
vith significant disabilities is mutually beneficial family and
;chool partnerships. When families and schools work together to
:reate quality inclusive educational experiences for students with
;ignificant disabilities, they do not always agree about every deci-
;ion, but they hold a common vision and make a commitment to
work together even when differences of opinion exist (Sommerstein
& Wessels, 1996).

The following experience of Beth Dixon and her son, Andrew,
:xemplifies the kind of collaborative partnership that can be forged
between families and schools.

Andrew's Story

When her son, Andrew, was in preschool, Beth Dixon attended the New
Hampshire Leadership Series sponsored by the Institute on Disability
(IOD) at the University of New Hampshire. For three weekends, parents
of students with significant disabilities came together to articulate a
vision for their children's futures, learn about current best practices in
education, and develop skills in community organizing. At the end of the
series, Beth said that she had totally changed her vision of what Andrew's
schooling and future should look like. She no longer felt that Andrew was
"broken" or "needed to be fixed" before he could be a part of a main-
stream classroom and school community. So, for the next 10 years, Beth
worked to share her vision with the school and enlist its help to give
Andrew a typical education with the supports and services he needed in
order to be a full participant.

In the early years of Beth and Andrew's journey, she recalls team
meetings in which professional after professional would read reports
summarizing Andrew's "deficits" and then make recommendations for
therapy or remedial services to eradicate them. During these meetings,
there were always many reasons given for why Andrew was not ready for
the general education classroom, such as the severity of his disabilities.
Beth recalled one meeting when Andrew's elementary school principal,
who was very wary of Andrew's entry into first grade, summarized the
whole team's feelings.

He asked, "Beth, I just can't imagine what you think Andrew will get out of coming to school here. What do you really want for him?"

Without a moment's hesitation, she said, "I really want him to get invited to a birthday party. I want other kids not to be afraid of him in the grocery story. I want him to be able to go to our neighborhood school just like my other kids did."

A look of relief passed over the principal's face, and he smiled. "Well, you know, Beth, I think we can do that here."

By the time Andrew was in high school, the initial resistance had turned into planning for how, not why. Every 6 weeks or so, Beth and Andrew would sit down with a couple of key team members and talk about Andrew: his likes and dislikes, his interests and passions, his temperament and communication style, and the supports he needed in order to have a typical high school experience. The partnership they developed over the years was not always harmonious, but overall, Beth felt that her wishes for Andrew were honored and that the school did its best to provide the supports Andrew needed for a typical high school education. Likewise, Beth treated the school team members as allies and made it a point to acknowledge their hard work, their commitment to Andrew, and their willingness to push through difficult problems to reach a win-win situation for both the family and school.

Beth and the members of Andrew's school team did not arrive at this partnership by accident. Beth took an active role in Andrew's education and used her knowledge of community organizing to enlist the school's support of her vision for Andrew. She found in-service training workshops and attended them with Andrew's team. She contacted the IOD and took the lead on securing long-term technical assistance for Andrew's team. She encouraged other parents in her district to attend the Leadership Series so that they, too, would develop new visions for their children. Years later, Beth expanded her commitment to advocacy when she became the coordinator of the Leadership Series, helping more than 400 families create their vision of inclusive education for their children.

How to Know It When You See It

When the relationship between a family and a school has soured, the following scenarios are all too frequent:

* The school neither listens to nor supports the family's vision for their child, but rather promotes its own view of what the child's education should be like and where he or she will go in the future.

- IEPs are developed by the school team and then presented to parents for their signatures without the parents' having any chances to offer their input.

- The family assumes negative intentions on the part of the school and creates an antagonistic atmosphere in every interaction.

- The family and team members only meet when legally required to do so.

- Communication between the family and the team is spotty and focuses primarily on legal documents and formalities.

When a family and a school work collaboratively toward a common vision for a student with disabilities, as in the story of Beth and Andrew Dixon, the following statements are true:

- School staff members respect the family's cultural background when developing and implementing the student's educational program.

- The family's priorities are reflected in annual goals on the student's IEP.

- The family acknowledges the teachers' efforts on behalf of their child.

- The family knows about resources for building their own leadership and advocacy skills relative to their child's education.

- The family attends case-management meetings or curriculum planning meetings on a regular basis.

COLLABORATIVE TEAMING

Team collaboration, the fourth promising practice, has always been the cornerstone of effective inclusive education for students with significant disabilities. Thousand and Villa (2000) defined collaborative teams as those that coordinate their work to achieve at least one common goal; hold in common a belief that all team members have unique and needed expertise; demonstrate parity, alternatively engaging in the dual roles of teacher and learner, expert and recipient, consultant and consultee, mentor and protégé; distribute leadership functions; and employ collaborative teaming processes.

A collaborative team must include the right people: those who are essential to the team in order to ensure the student's success as well as those who want to be members of the student's team. Each person

sees his or her role as supporting inclusive and effective education for all students. There is a "we are all in this together" feeling among team members. Members of the team possess the disciplinary expertise unique to their professions and use effective interpersonal and communication skills, including problem-solving, decision-making, long-range planning, and conflict-resolution techniques.

Villa and Thousand (1996) also noted that involving classmates without disabilities and siblings on a student's educational team is too often overlooked; they suggested that peers and siblings can serve as useful resources for good ideas, energy, and information about what constitutes a typical school experience.

It is essential for an effective collaborative team to have frequent face-to-face interactions to celebrate and socialize, engage in programmatic planning and evaluation, and raise and resolve problems and concerns. The team uses formal meeting processes that produce a written record of discussions, decisions, and action plans. To support its continued growth, the collaborative team periodically evaluates the quality of its collaboration and engages in professional development activities related to teaming.

A collaborative team goes through many stages of development. It will begin with the team's formation and initial trust building, and ideally, it will culminate with a high level of team functioning in which strategies are in place to deeply reflect on its practices and resolve conflicts (Thousand & Villa, 2000). Within a collaborative team, all members take responsibility for creating a classroom environment in which all students are members and can participate fully. The specific roles and responsibilities of each team member are identified, and there is considerable overlap between the responsibilities of the classroom teacher and the special education professionals.

How to Know It When You See It

When teams are in disarray or are otherwise unable to collaborate effectively, they often have the following characteristics:

- General and special educators do not share responsibility for all students' success; instead, there is an attitude among members of the team of "my students" versus "your students."

- Special education staff members only serve students with disabilities, oftentimes in segregated environments.

- Roles are not clearly defined among team members: Sometimes no one is accountable for an important task; other times several team members work on the same task at cross purposes or there is outright conflict among team members regarding role definitions or educational practices.

- Little collaborative planning time is available for team members.

- Communication among team members is spotty, and important information is not shared in a timely manner.

- No agreed-on process exists to make decisions or resolve conflicts.

- Follow-through is inconsistent and accountability systems are not in place to ensure that tasks are completed in a timely fashion.

When teams are collaborative, the following statements are true:

- The roles and responsibilities of all teachers and staff reflect the commitment and skills needed to teach all students, including those with disabilities.

- Special education staff work within the general education classroom as co-teachers, team-teachers, small group instructors, or one-to-one support teachers for all students in the class.

- The roles and responsibilities of special education teachers, paraprofessionals, and related-services providers reflect the provision of supports and services that enable students with disabilities to participate in and benefit from the general education curriculum and enable teachers to effectively teach heterogeneous classes.

- Collaborative planning time is provided during the school day for general and special education teachers and related-services providers.

- Teams use formal processes to conduct meetings, problem-solve, make decisions, and evaluate their effectiveness.

PLANNING AND IMPLEMENTING OF SUPPORTS

Many parents and educators believe that the performance of students with significant disabilities is more closely related to the quality of supports provided to them than it is to their disability labels. The fifth promising practice is that students should be provided with supports that enable them to fully participate in and make progress within the general education curriculum and other inclusive academic and social interactions, activities, and environments. A combination of natural

and specialized supports should be considered effective when they serve to maximize learning, self-determination, inclusion, and reciprocal relationships between students and their peers.

Creating a School Culture that Celebrates Diversity

What does a school's culture have to do with supports for students with significant disabilities? When a school says "all children belong here" and breaks down attitudinal, architectural, and instructional barriers for students with disabilities, the need for specialized supports for those students decreases (Sapon-Shevin, 1998). In an inclusive and accessible school, all educators embrace a shared responsibility to create a schoolwide culture that naturally encompasses all students, including those with disabilities. Disability is not a unique difference, but a natural part of the human experience (Snow, 2001). In such a school, differences among all children are made ordinary by

- Embedding social justice topics into the general education curriculum (Fisher, Sax, & Jorgensen, 1998)

- Establishing schoolwide celebrations of diversity (Sapon-Shevin, 1998)

- Abandoning labels and attitudes that reflect *handicapism*, a "set of assumptions and practices that promote the differential and unequal treatment of people because of apparent or assumed physical, mental, or behavioral differences" (Bogdan & Biklen, 1977, p. 69)

- Helping students understand their own strengths and needs by respecting and accommodating different learning styles, talents, and intelligences (Gardner, 1983)

- Designing curriculum and instruction right from the start to naturally include students with different learning and communication styles, different temperaments, and different ways of "showing what they know" (Onosko & Jorgensen, 1998)

- Eliminating tracking, whole class ability grouping, and separate special education classrooms and programs (Jorgensen, Fisher, Sax, & Skoglund, 1998)

- Giving out awards based on personal best achievement

Inclusion facilitators model these values through their language and practices. In addition, they often serve in leadership roles within their schools to implement reforms related to these practices through professional development and school improvement.

Planning Supports

When a student with significant disabilities needs additional supports in order to fully participate and learn, the student's instructional team shares this responsibility, with the inclusion facilitator providing leadership, offering expert knowledge, and facilitating the participation of other team members. "Big picture" planning for student supports happens at the annual IEP meeting, but the real work of planning supports occurs through regularly scheduled team meetings that consider upcoming lessons, activities, and events. During these instructional planning meetings, specific supports can be identified to enable a student to participate and learn, and the team should carefully plan the resources and assistance that are necessary in order to accurately and reliably deliver the student's supports (McSheehan et al., 2002). Student plans should describe the supports needed, who will provide them, when they will be provided, and the preparation required ahead of time in order for the provider to be ready when the support is needed.

The first level of supports that ought to be considered are those that can be provided by someone who will be in close proximity to the student during the identified activity. This person might be a classmate, a classroom volunteer, a classroom teacher, or another member of the school community who will be involved in the activity. A member of the student's educational team such as a paraprofessional, speech-language pathologist, occupational therapist, or special education teacher often provides the second level of supports. When a balance between natural and specialized supports is achieved, students are less likely to develop an overreliance on paraprofessionals, and students are more likely to develop connections to their classmates (Giangreco, Edelman, Luiselli, & MacFarland, 1997).

Implementing Supports

Implementing supports requires a commitment to the plan agreed to by the team, expertise in many areas (e.g., AAC, movement and sensory differences, reading instruction), and flexibility to adjust the plan when an unexpected situation arises. Supports for students with significant disabilities have been described and categorized in many ways by various authors (Falvey, 1995; Giangreco et al., 2000; Onosko & Jorgensen, 1998; Weymeyer, Sands, Knowlton, & Kozleski, 2002). A framework that blends elements of all of these models (i.e., supports for students with significant disabilities) is available in Appendix B.

Evaluating Supports

In day-to-day practice, a discrepancy often exists between the supports that were planned and those that are actually delivered (McSheehan et al., 2002). It is unfair to render judgment of student performance unless quality supports have been provided. Therefore, an integral part of the evaluation process must include a careful assessment of the quality of supports. Inclusion facilitators should ask, "Did we provide the supports we said we would?" "How accurately were supports provided?" "Did we provide them in the right situations?" "Did we back away when we should have?" "How might we do better next time?" and "How will we know?" Teams should be mindful that the most prudent course of action to take when trying to assess students with significant disabilities is to postpone judgment until the actual supports that are delivered better match those that were planned.

How to Know It When You See It

When supports are **not** being provided or are being provided ineffectively, the following indicators are all too common:

- Students with disabilities are sitting idle when a paraprofessional is not right at their desks.

- Students with disabilities are seated away from their classmates.

- Paraprofessionals physically serve as buffers between students with disabilities, the classroom teacher, and other classmates.

- Adults serve as conversational go-betweens rather than students interacting with one another.

- The academic performance of students with disabilities is poor.

- The behaviors of students with disabilities are inappropriate.

When supports are provided to students according to these promising practice guidelines, the following statements are true:

- Students with disabilities are being called on in class—and in response, they answer questions and make comments.

- Students with disabilities are provided with academic materials with which to work at the same time as their classmates.

- Students with disabilities talk directly with the classroom teacher and their classmates.

- Students with disabilities are busy at the same times as their classmates.

- Support personnel help all students in the class.

APPROPRIATE AUGMENTATIVE AND ALTERNATIVE COMMUNICATION

The sixth promising practice in inclusive education is to provide students with a means to communicate about academic and social topics that are relevant to their classmates without disabilities. Philip's story illustrates the impact that appropriate communication supports can have on a student's entire educational experience.

Philip's Story

Philip was in fourth grade at his neighborhood elementary school and had been included in general education classrooms since first grade. On his IEP, Philip had been given the label of autism. Philip communicated using some signs, gestures, and a Go Talk device (Attainment Co.). In addition, Philip used some signs, natural gestures, and a number of differentiated vocalizations.

Even with these communication skills and supports, Philip was not able to participate fully in his general education classroom, nor was he able to communicate with classmates about the things that 9-year-old boys talk about. It is not surprising that Philip's most recent 3-year evaluation stated that he had moderate mental retardation because, of course, he did not perform well on tests that required communication skills!

When his team became part of the IOD's Beyond Access Model Demonstration Project, it worked to enhance Philip's communication system. It expanded his communication options to include general messages that could be used in a variety of situations (core vocabulary) as well as content-specific messages that would allow Philip to participate in classroom lessons and topic-specific conversation (Sonnenmeier, McSheehan, & Jorgensen, 2005).

The team decided to explore the use of symbols other than the Picture Communication Symbols that were available in Mayer-Johnson's Boardmaker software on the district's computers. In addition, the team included text on his devices. A 40-item communication board was designed to include frequently occurring core vocabulary, selected based on a review of a list of functional words that were being taught in the classroom and a review of standardized lists of core vocabulary

(Bruno, 1999). Additional communication boards for sentence fill-in activities were made for specific lessons, and a desktop computer was programmed to use Speaking Dynamically Pro with Boardmaker color symbols.

Within 2 months of the introduction of the new communication supports, data indicated that Philip did indeed have a valid and consistent yes/no response—a goal that had been included on his IEP since he was 3 years old! A year later, Philip had access to an expanded vocabulary set of 80–100 messages available on a DynaMyte, a desktop computer, and on communication boards.

Philip developed an ability to communicate with words using AAC. He learned to use some single words and word combinations to make requests for desired items, actions, and locations when provided with modeling and physical support as needed. In addition to using words functionally, Philip demonstrated an increased ability to recognize words in print.

Philip's story exemplifies what progress can be made when a team understands the essential role of appropriate communication supports to facilitate participation and meaningful inclusion.

How to Know It When You See It

When a student with disabilities is **not** provided with appropriate or effective communication supports, the following scenarios are all too common:

- The student with disabilities does not have a means to communicate all of the time.

- The communication system of the student with disabilities reflects outmoded assumptions about cognitive prerequisites and does not allow the student to communicate about age-appropriate academic curriculum or to participate in age-appropriate social interactions with classmates.

- The communication system of the student with disabilities is designed by the speech-language pathologist without input from the student, parents, or other team members.

- People talk for the student with disabilities rather than supporting the student's communication.

- People talk to the support staff rather than directly to the student with disabilities.

- No training is made available for classmates, family members, or general education teachers on how to use the communication system of the student with disabilities.

- The communication supports being provided to the student with disabilities are dictated by the school district's budget rather than the student's needs.

When a student with disabilities is effectively supported to communicate, the following statements are true:

- The student with disabilities has a means to communicate all of the time.

- The student with disabilities communicates for a variety of purposes.

- Although the student with disabilities may have multiple ways of communicating, a primary means of communication is identified.

- The communication system of the student with disabilities is programmed with messages to demonstrate learning of age-appropriate core academics, commensurate with his or her age-appropriate classmates.

- The communication system of the student with disabilities is programmed with messages for social communication that promote his or her participation in school and community extracurricular activities with peers without disabilities.

- The AAC system provided enables the student with disabilities to communicate for the purposes of self-determination and futures planning.

- The student with disabilities, his or her family members, and classmates without disabilities participate in the selection of messages programmed into the AAC system.

- People who are acting as communication facilitators for the student with disabilities clearly engage in a supportive role and do not actively participate in the content of the interaction between the student and his or her conversational partners.

- Classmates and adults who converse with the student with disabilities utilize information provided by facilitators to converse directly with the student, not just with or through the facilitator.

- The student with disabilities is provided with the training and support to use the AAC system in the contexts and routines in which the student will communicate.

- Training and support to use the AAC system is provided to the team, including classmates, in the contexts and routines in which the student with disabilities will communicate.

- The AAC supports of the student with disabilities take into consideration the communicative functions of any challenging behavior.

- A variety of funding sources and streams (e.g., Medicaid, Medicare, private insurance, school funding) are utilized to acquire and maintain assistive technology and AAC systems and to support training for the student with disabilities, his or her family, classmates, and support personnel.

FRIENDSHIP FACILITATION

The first essential condition for friendship is full inclusion. When students with disabilities are kept apart from the mainstream of school life, they have few opportunities to develop friendships (Martin, Jorgensen, & Klein, 1998). When students are educated in separate classrooms, their relationships tend to be based on benevolence rather than shared interests and respect for one another's diversity (Kunc, 1992). Sharing recess, lunchtime, and extracurricular activities are recognized as the key ingredients to forming friendships. Students who experience significant disabilities should be members of sports teams, perform in band and choral groups, and perform in school plays. Accessible transportation and staff support must be provided when necessary to enable students to participate successfully. Many students with significant disabilities need the support of individuals and policies that will intentionally facilitate social relationships (Forest, Pearpoint, & O'Brien, 1996). Making a commitment to facilitating students' social relationships is the seventh promising practice of inclusive education.

Brian's story is not front-page news, nor would it win any awards as a shining example of a great friendship program. Yet, it contains lessons about the importance of friendship in students' lives.

Brian's Story

After spending his entire educational career at a segregated special education school, Brian made the transition back to his own school district as a ninth-grade student. He was a student who would not typically be the most popular kid in school. To some of the students, he was just a kid

with a bad haircut; others noticed that his eyes were crossed, his facial features were irregular, he had significant physical disabilities, he did not talk, and he sometimes scratched himself or others around him.

With assistance from a model demonstration project that focused on inclusion and school reform, the school did an excellent job of supporting Brian's inclusion into typical academic classes (Crowder, 1994). But by the end of his sophomore year, it was clear that something was missing. Unlike some of the other students at his school who experienced significant disabilities and yet were able to make extracurricular and social connections, Brian still spent most of his day surrounded by adults. When he went home after school, he spent the evening in his room by himself watching television. Brian began to communicate that he was lonely and wished that other students were not afraid of him and would take the time to talk to him.

Since entering school, Brian's educational plan had focused on his acquisition of the skills people thought he would need in order to be successful in school and in the community. He had mastered some of these skills, but still, he had no friends. His IEP team began to understand that friendships are more than a nice benefit of an education. In fact, according to Strully and Strully, "Relationships, including friendships, are at the very heart of what is needed to ensure a high quality of life for each of us" (1992, p. 165). So Brian's team decided that in order for him to form and sustain friendships, they would have to intentionally work toward that goal.

Over the next 2 years, Brian's team struggled to figure out what friendship was really about for Brian. Throughout this time, Brian's family, a dedicated group of professionals, and one other student remained stable in his life. The other classmates who entered into his social circle changed frequently. His team learned that friendships couldn't be forced, bribed, or achieved through special friendship programs. They learned that sustaining work around friendships requires at least one committed adult in a student's life who is in it for the long haul. They also learned that many students were interested in getting to know Brian but needed some support to figure out how to be his friend without falling into the trap of just being his helper or special buddy.

How to Know It When You See It

When a student with disabilities has few friends and is **not** supported to develop authentic friendships, the following indicators are all too common:

- The student with disabilities is always on the receiving end of support, in the position of being helped.

- The student with disabilities forms friendships only with other students with disabilities.

- The student with disabilities only participates in leisure, sport, and recreational activities that are specialized (e.g., Special Olympics).

- The student with disabilities spends most of his or her in- and out-of-school time with professionals or family members.

When a student with disabilities is socially included, the following statements are true:

- The student with disabilities has the same variety of social networks as students without disabilities: close friends, acquaintances, and kids with whom they share activities.

- The student with disabilities participates in the same variety of inclusive and typical extracurricular activities as students without disabilities.

- Adults facilitate the building of social networks for the student with disabilities when necessary.

- Physical, emotional, and instructional supports are provided by classroom teachers, librarians, classmates, office personnel, or volunteers—not special educators—whenever possible.

- The student with disabilities has opportunities to provide as well as receive support and assistance.

GENERAL AND SPECIAL EDUCATION REFORM

Administrative leadership is necessary to align general and special education reform in order to create a community of learners that includes students with significant disabilities. This commitment to effective and inclusive education for all students is the eighth promising practice (Lipsky & Gartner, 1997).

The stories that follow of two contrasting high schools illustrate many differences when inclusion *is* or *is not* a part of overall school improvement and reform.

An Inclusive, Restructuring School

Souhegan High School opened in 1992 as a member of the Coalition of Essential Schools, a national school reform network (Jorgensen, 1998).

Approximately 550 students from three rural towns came together in this very differently organized high school. At the ninth- and tenth-grade levels, students and teachers were members of small learning teams, although the eleventh and twelfth grades were organized more traditionally. Although the administrative team considered a plan to open the school with more traditional self-contained classrooms and resource rooms and then work toward integrating students, they eventually decided to "start where we want to end up" and include all students as full-time members of heterogeneous general education classrooms.

The school did not practice tracking or ability grouping, and all ninth- and tenth-grade students took the same English, history, science, and math classes. The school's curriculum was based on several key ideas. Essential questions (e.g., Can you be free if you are not treated equally?) formed the foundation of all units of study (Cushman, 1990). Teachers used differentiated instructional strategies that addressed students' varied learning styles. Assessment was based on some traditional measures such as homework and tests, but at the end of major units of study, students were asked to demonstrate what they had learned through public, performance-based exhibitions.

The roles of general and special education teachers had a great degree of overlap with respect to responsibilities for students with and without disabilities. General education teachers were primarily responsible for curriculum design, instruction, and assessment of all students. Special education teachers, called *learning specialists*, were full-time members of the ninth- and tenth-grade teaching teams, and the whole team met for 90 minutes a day for curriculum planning and to discuss instructional and classroom management. In the eleventh and twelfth grades, the learning specialists were members of either the humanities team (English, psychology, arts, history) or the combined math, science, and technology team. The role of the special education teachers included co-teaching, small group instruction, one-to-one assistance to any student who needed it, and instructional support provided in the school's Learning Center.

The Learning Center was staffed throughout the day by both general and special education teachers. Students with and without disabilities went to the center during their free periods to get help with homework, study skills, or large class projects.

Four students with significant disabilities (with labels of mental retardation and autism) who had been educated in out-of-district special education programs were returned to the high school, and a special education teacher was designated as their inclusion facilitator. This teacher's role consisted of case management, coordinating each student's services, acting as a liaison with parents, developing adapted curriculum materi-

als, and supervising student-specific paraprofessionals. The inclusion facilitator sat in on teachers' curriculum planning meetings so that he would know about upcoming lessons, but he was not generally involved in delivering whole class instruction.

Students with significant disabilities at Souhegan were involved in many different extracurricular activities, including sports teams, computer club, recycling club, and the school's Community Council. Their postsecondary school plans were individualized. Some went on to supported work, and some went on to a combination of postsecondary education and work.

A Noninclusive, Traditionally Structured High School

Granite State High School was a traditional high school in its general and special education philosophies, structures, and practices. There were seven levels of classes in most subject areas, including honors classes; two levels of college preparatory classes; three levels of general, noncollege preparatory classes; and basic skills classes reserved for students with disabilities. Because of scheduling difficulties, a student who was placed in a basic skills class for history could not take a higher level English class, even if the student's team believed that he or she could handle the curriculum's demands. Many students with disabilities were in classes that did not teach to the New Hampshire Curriculum Framework Standards. Instead, they studied a special education curriculum consisting of language arts and math skills in addition to functional life skills such as cooking, doing laundry, and using money.

Special education teachers taught the basic skills classes and had little time available to consult with general education teachers who had students with disabilities enrolled in their classes. General and special education teachers attended different professional development workshops, with general education teachers learning about teaching innovations in their subject area and special education teachers learning about changes in special education law or how to write better IEPs.

At Granite State High School, students with significant disabilities were educated in the school's basement. They did not participate in extracurricular activities or serve on the student council. Their post–high school education plans were characterized by placement in sheltered workshops, and many did not receive services because of a long waiting list for state-funded services.

The school's administrative leadership team was sharply divided along traditional general education and special education lines. The spe-

cial education building coordinator was actually housed in a different building several miles away from the high school campus. Many times both the principal and special education coordinator said that, although their school might eventually become more inclusive, they were committed to *never* including students with significant developmental disabilities within the mainstream of school life.

Mirroring their administrators' views and practices, special education teachers held monthly faculty meetings separate from their general education colleagues. Several years previously, a progressive assistant principal tried to institute changes in the tracking system to collapse the three, noncollege preparatory levels into one heterogeneous level. Despite bringing in resources for long-term professional development and teacher consultation, he encountered significant resistance from teachers who believed that some students would never master high curriculum standards and that it was impossible to teach a diverse classroom of learners.

The educational programs of students with significant disabilities are significantly different at Granite High School compared to Souhegan High School. The Granite High School Vice Principal's goal of reducing the number of tracked classes and integrating some students with disabilities into more heterogeneous courses was not successful because it ran contrary to the teachers' long-held view that tracking was effective for students and manageable for teachers. The change was not seen as a logical extension of the faculty's philosophy about student learning and effective teaching. At Souhegan, the proposal to include students with significant disabilities in general education classes was successful because it was viewed as a natural extension of their emerging philosophy of quality education for all students.

How to Know It When You See It

When a school only gives lip service to inclusive education, actively discourages it, or treats inclusion as a special education initiative, the following indicators are all too common:

- The school community does not espouse the values of diversity and inclusion.

- The school does not publicly support inclusive education but reluctantly endorses the least-restrictive environment requirements of the special education law.

- The school views efforts to improve general education and special education as separate initiatives, and staff members from one area do not generally participate in reform efforts for the other.

When a school is truly inclusive, the following statements are true:

- The values of diversity and inclusion are evident in the school's mission statement.

- General and special education administrators promote the values and benefits of inclusive education at meetings; in conversations; in school improvement plans; and in annual reports, school newsletters, and web sites.

- General and special education personnel participate together in schoolwide improvement and reform efforts that benefit students with and without disabilities.

ENCOURAGEMENT OF SELF-DETERMINATION

In its earliest conceptualization, *self-determination* referred to the inherent right of individuals with disabilities to assume control of and make choices that affect their lives (Nirje, 1972). Self-determination is characterized by personal attitudes and abilities that facilitate an individual's identification and pursuit of meaningful and self-identified goals. It is reflected in personal attitudes of empowerment, active participation in decision-making, and self-directed action to achieve personally valued goals. "An individual is self-determined if his or her actions reflect four essential characteristics: autonomy, self-regulation, psychological empowerment, and self-realization" (Wehmeyer, 1996, p. 116). Promoting all students' self-determination is the ninth promising practice in inclusive education.

Amro's Story

When Amro Diab first came to Souhegan High School in Amherst, New Hampshire, he put his head down on the desk if adults spoke to him and hugged the wall in the hallway as he walked to class. By the time he had graduated 4 years later, he had played in several high school football games (kicking off at the beginning of each quarter), been voted Senior Prom King by his classmates, received the Souhegan Saber Award as the student who best exemplified the school's mission statement, and gave his senior project presentation on "My School to Work Transition." In most schools, Amro would not likely have been given the opportunity to develop his self-determination skills; many people believe that individu-

als with significant cognitive disabilities are unable to make responsible decisions, need protection or legal guardianship, and are too vulnerable to be exposed to the kinds of typical life experiences from which self-determination grows (Wehmeyer, 1996).

The development of Amro's self-determination occurred as a result of many interrelated experiences throughout his high school years. Perhaps the most significant was that Amro was fully included in a typical array of general high school classes at Souhegan, and he was *not* educated in the restrictive environment of a self-contained classroom. Amro rode on the school bus with his general education peers in the morning. He passed from class to class unassisted. During unstructured time in the classroom, he received most of his support from other students. He used a letter communication board for both social communication and to support his participation in academic lessons. He became a member of the football team his freshman year and gradually moved from the position of assistant manager to occasionally participating in games.

Amro had a unique personality. On one hand, he loved being in social situations and could give and take good-humored ribbing just like his classmates. On the other hand, he could be extremely shy and reticent in new situations. Instead of making decisions for him when he was uncertain, his support staff encouraged him to try out several different alternatives (e.g., school clubs), and then they coached him to make decisions based on these trial experiences.

Amro had the opportunity to give several presentations about school inclusion before the local school board, the New Hampshire State School Board, and conference audiences comprised of educators and parents from all over the United States eager to learn about inclusive education and school reform. Over time, the young man who had cowered in the hallway during his first week in an inclusive school situation learned to stride confidently up to the podium at the IOD's Equity & Excellence conference. He used his letter board to answer questions from the audience about his high school experiences (Diab, 1996).

Within everyday interactions both in and outside of the classroom, Amro was supported to make choices about class projects, extracurricular activities, and work opportunities. Every summer, he worked alongside a classmate who did not have disabilities, gaining experience in heating and air-conditioning repair, house painting, packing groceries, and retrieving shopping carts at a local store. He attended his own IEP meetings, and during his senior year, he focused his senior graduation project on making a postgraduation plan. Between the ages of 18 and 21, when he was still receiving special education services, he explored a number of other jobs including working at a candle factory and at a restaurant. By the time he left the educational system, he was

working about 30 hours a week, living at home with his family, working out at a fitness club, and exploring the possibility of opening a family-run business.

Amro's life changes quite frequently, just like the lives of other young men in his community. His quality high school education and growing self-determination skills help him deal with change, and with the support of his family and the people that he has come to know in his community, he has a full life.

How to Know It When You See It

When self-determination is **not** a priority for a student with disabilities, the following indicators are all too common:

- Adults make all decisions about the student's education and future; the student with disabilities is not asked to express preferences nor involved in decision making.

- The student with disabilities does not attend meetings at which his or her education or future is discussed.

- The student's IEP does not reflect choice and control issues.

When the life of a student with disabilities is self-determined, the following statements are true:

- The student with disabilities communicates his or her own thoughts, concerns, opinions, and wishes, with support from augmentative communication, friends, family, and educators.

- The student with disabilities has control in decision making that affects his or her life.

- The student with disabilities participates in IEP meetings from junior high or middle school through graduation.

- The student with disabilities is encouraged to join organizations that promote self-determination and to design a postgraduation futures plan based on his or her wishes, interests, and talents.

- The student with disabilities has the opportunity to participate in peer mentor programs both as a mentor and as a protégée.

- The student with disabilities has access to and interactions with adult role models with and without disabilities.

- The student with disabilities has the opportunity to fail and learn from mistakes.

PERSON-CENTERED PLANNING

The tenth promising practice in inclusive education is the use of *person-centered planning strategies*. These strategies help students and their families articulate a vision for an inclusive life in the school and community and help build the relationships, supports, and resources necessary to reach that vision (Mount, 2000). Personal futures planning was first developed "between 1973 and 1986 among people from across North America who shared a passion for understanding and teaching how the principles of normalization might be applied to improve the quality of services to people with disabilities" (O'Brien & Lyle-O'Brien, 2000, p. 3; see also Forest et al., 1996).

The different versions of personal futures planning all share the following characteristics:

1. The individual and sometimes the person's family controls the decisions that will be made, defined by the outcomes desired by them.

2. Planning is not a one-meeting event but rather a long-term commitment and process that evolves over time.

3. Planning is not a formula for service planning but rather a creative process through which "a group's ability to create meaningful opportunities and supports emerges as people develop the skills to think strategically together" (Cotton, 2003, p. 16).

The first person-centered planning sessions were held with adults who were considering moving out of institutions into the community, but person-centered planning is now a strategy used with school-age students at various points in their educational careers.

How to Know It When You See It

When person-centered futures planning is **not** utilized, the following indicators are all too common:

•   The student with disabilities and his or her parents are not asked about their vision for the student's education or future adult life.

•   Although a plan is developed, there is no effort to identify the supports that will be needed in order for the student with disabilities to achieve the plan's goals.

- Untrained and/or uncommitted people are in charge of futures planning for the student with disabilities, and there is no accountability to the student or the family for the plan's success.

- Futures planning includes only paid professionals rather than the student's friends, family, classmates, co-workers, or other individuals who are not paid to be in the student's life.

When person-centered planning guides a student's school program and postsecondary school plans, the following statements are true:

- As soon as the student with disabilities is school age, a person-centered planning process is used to plan critical transitions in the student's school career (e.g., entry into preschool, first grade, middle school, high school, graduation planning).

- A person-centered plan includes specific strategies to maximize the control of the student with disabilities over both personal and publicly funded resources.

- A person-centered plan utilizes natural and generic supports to the maximum degree possible, supplemented by specialized supports.

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3

Transforming Hearts and Minds

The Inclusion Facilitator's Role as a Change Agent

Cheryl M. Jorgensen

A 1913 version of Webster's dictionary defines transformation as "a change in disposition, heart, character, or the like" in which heart is meant as "the seat of the affections or sensibilities . . . the better or lovelier part of our nature; the spring of all our actions and purposes; the seat of moral life and character" (*Webster's Revised Unabridged Dictionary*). This chapter is about the inclusion facilitator's role in helping to transform others' beliefs about inclusive education and students with significant disabilities. Changing people's core values and beliefs about inclusion is essential, as "a teacher's self-knowledge of what he or she stands for is the most important gyroscope a professional educator has to maintain a steady course through the bumpy shoals of life in school" (Garmston & Wellman, 1999, p. 25). The chapter focuses on "the 'human face' which embraces the emotion, feelings, needs and perceptions of teachers and leaders as well as their roles and beliefs and/or pedagogical assumptions" (Norman, 2001, p. 1). It is grounded in the professional literature on general and special education reform and high-quality professional development, but, above all, it reflects the 20 years of experience the author of this chapter has educating preservice teachers, providing student-specific consultation, and working with numerous school districts on inclusive education systems change projects.

This chapter is also about changing beliefs. It is about changing the beliefs of paraprofessionals who support students so that these paraprofessionals see their role as learning and social facilitators rather than as helpers who hover over students every minute of the

day (Giangreco, Cloninger, & Iverson, 2000). It is about changing general education teachers' beliefs so that they hold the least dangerous assumption about students' capabilities and have high expectations for student achievement (Donnellan, 1984). It is about changing related-services professionals' understanding of their primary contribution to students' teams from that of providing direct service to supporting students' communication, behavior, and movement within typical routines and lessons. Finally, it is about helping parents recapture their lost dreams so that they believe once again that their children deserve an enviable future as a respected member of the community.

Chapter Organization

The chapter is organized in four parts, which can be read consecutively or by particular sections in order to fill the gaps in current understanding and experience. First, the notion of change agentry is introduced. Second, three characteristics of an effective change agent (i.e., guiding principles, a belief in personal efficacy, specific intervention skills) are elaborated. Third, a perspective is described through which inclusion facilitators can understand the personal identities or traits of their colleagues that influence their behaviors. These identities include bottom-line values, concerns about inclusion, and personality types. The fourth and final section presents a detailed case study of an inclusion facilitator's experience with a school struggling with the philosophy and practice of inclusion.

CHANGING INDIVIDUALS

If you pick up any book about education that has been written since 1980, the focal point for reform is the group and the system (and in particular, the culture of the system) rather than the individual. The author of this chapter acknowledges the critical need for systems thinking within educational reform efforts (see required reading such as Fullan, 2001; Garmston & Wellman, 1999; Jorgensen, 1998; Sarason, 1996; Senge, Kleiner, Roberts, Ross, & Smith, 1994; Sizer, 1992; Villa & Thousand, 2000), but she has chosen to focus this chapter on the often neglected topic of changing the individuals who comprise the educational systems, who must have their own self-interests resolved before they can truly show concern for the organization (Hall & Loucks, 1978). The author's decision to focus on changing individuals acknowledges that there are many special

education teachers who work in very traditional (or dysfunctional) school systems but are committed nonetheless to including their students and want to know how they can begin the process of inclusion in the absence of a reform-minded culture.

This chapter describes the characteristics of and strategies used by inclusion facilitators who want to be effective change agents. The Concerns-Based Adoption Model (CBAM) is presented, which can help an inclusion facilitator answer the following questions about each person (e.g., paraprofessional, general education teacher, related-services professional, parent) that he or she deals with and then use the answers to plan strategies for transforming that person's beliefs and practices:

1. What does this person **value**?

2. What are this person's **concerns** about inclusion?

3. How might this person's **personality type** affect the best way to communicate and work with him or her?

Limitations of This Model

This model is not without its limitations. First, no one paradigm explains everything about human behavior. Organizations and change are complex. Many theories of motivation, individual behavior, group behavior, and systems theory have been postulated to explain why educators do one thing versus another.

A second limitation is that the elements of the model described in this chapter are not mutually exclusive. The theoretical underpinnings of research on personality types, concerns, and value systems have many common ancestors in the fields of philosophy and psychology. Thus, the inclusion facilitator should not consider the strategies described in this chapter as part of a cookbook recipe, but rather, as an interesting lens through which to view the challenge of transforming people's core beliefs and related actions.

Third, change agents themselves are as varied as the individuals or systems they wish to change. Some are charismatic; others have modest personalities. Some are new to the profession; others have many years of experience. Some start with quiet grassroots efforts; others give eloquent speeches that rally thousands to action. One does not need to become a Martin Luther King, Jr., or a Mother Teresa in order to be an effective inclusion facilitator change agent, although learning from the histories of these leaders can help to enhance anyone's effectiveness.

Finally, although each element of the model described herein has research supporting its effectiveness in specific situations, no body of research has demonstrated the efficacy of using the described strategies in the way that they are organized together in this chapter. The usefulness of this paradigm will be judged through the experiences of those who try it in their own schools and then reflect on their experiences with professional colleagues from other schools, each with their own unique histories and personalities. The authors of this book welcome this friendly criticism and believe that this kind of professional dialogue rooted in real-life practice will move us all forward in our quest for understanding what creates and sustains an inclusive school.

CHANGE AGENTRY

In Jan Nisbet's introduction to this book, she cites a variety of terms that have been used to describe people who see themselves as change agents, including *linker* (Havelock, 1971), *community organizer*, and *bridge-builder* (McKnight, 1995). A *change agent* is anyone, in any position or at any level, who is focused on the continual, constructive, reinvention of a system. He or she is always scanning for ideas, potential applications, needs, synergies, or emerging markets and is ready to move on anything promising. The change agent is nimble and strives to build flexibility in the surrounding system. He or she works the system, pulling in others and creating a movement around his or her mission. Change agents possess a clear understanding of themselves and their role (Center for Critical Impact, n.d.).

Teachers as Change Agents

In schools, the role of change agent has traditionally been assigned to the principal, the superintendent, or an outside consultant hired by the district to work on its long-range plan. Fullan recommended that teachers become agents of change because "to have any chance of making teaching a noble and effective profession . . . teachers must combine the mantle of moral purpose with the skills of change agentry" (1993, p. 12). Although having a moral purpose keeps teachers focused on the needs of their students, "change agentry causes them to develop better strategies for accomplishing their moral goals" (p. 13). Fullan described a "new conception of teacher professionalism that integrates moral purpose with change agentry,

one that works simultaneously on individual and institutional development" (p. 13). To the extent that inclusion facilitators are charged with the moral purpose of creating classroom and school communities in which diversity is celebrated, Fullan's call speaks directly to them.

Characteristics of Effective Inclusion Facilitators/Change Agents

Inclusion facilitators who are effective as change agents are guided by strong principles related to working with others, are confident about their own efficacy, and possess a broad repertoire of skills for working with diverse individuals in a variety of situations.

Principles To be effective change agents, inclusion facilitators must embody many important working principles, but the three that will serve them particularly well in their efforts to change others' hearts and minds about students with disabilities are their commitment to inclusiveness, their presumption of positive intentions, and their ability to balance inquiry and advocacy (Garmston & Wellman, 1999). Ironically, some advocates of inclusive education have not shown respect for opinions other than their own, leading to accusations that they are zealots who care more about their cause than about the feelings or concerns of others (Fuchs & Fuchs, 1994). When the cause is the inclusion of diverse students within the classroom and school community, an inclusion facilitator's attitude of "my way or the highway" can destroy credibility and hurt the very cause being promoted. Thus, the hallmark of an effective inclusion facilitator is the ability to be clear about one's values yet able to acknowledge the rights of others to disagree without making moral judgments.

How many of us have left a difficult meeting saying, "I don't trust Ms. X! She clearly has a hidden agenda—she probably doesn't even like kids with disabilities and unless we uncover her ulterior motives, we won't be able to gain control of this situation." Garmston and Wellman suggested that presuming positive intentions is a more effective way to approach individuals with whom we disagree or have conflict.

Assuming that others' intentions are positive encourages honest conversations about important matters. . . . Positive presuppositions reduce the possibility of the listener perceiving threats or challenges in a paraphrase or a question. . . . [When people presume positive intentions in one another] the emotional processors in the brain hear the

positive intention and open up access to higher level thinking [which can lead to more effective and inclusive solutions]. (1999, pp. 45–46)

The third working principle of effective inclusion facilitators is the commitment to balancing advocacy and inquiry. As an inclusion facilitator who may feel that inclusion is a moral imperative, it is tempting to see one's role as advocate and, therefore, perceive that articulating and arguing for inclusion is the right thing to do. Achieving a balance between articulating one's opinions and inquiring into the beliefs of others results in "more creative and insightful realizations that occur when people combine multiple perspectives" (Ross & Roberts, 1994, p. 253). The Skills section presents specific scripts that illustrate how to achieve this balance between advocacy and inquiry.

Self-Efficacy   Self-efficacy is the belief in one's capabilities to organize and execute the sources of action required to manage prospective situations. In plain language, "perceived self-efficacy is concerned not with the number of skills that you have, but with what you believe you can do with what you have under a variety of circumstances" (Bandura, 1997, p. 37). Inclusion facilitators come to believe in their ability to make a difference through personal experiences and identification with others who have accomplished similar efforts. Inclusion facilitators with a well-developed sense of efficacy

- Approach tasks as challenges to be mastered rather than situations to avoid

- Set challenging goals for themselves

- Maintain their commitment to those goals even after experiencing failure

- Attribute any lack of success to insufficient or ineffective effort on their part rather than to uncontrollable outside influences

These individuals persevere in the face of rejection, manage their stress in difficult situations, and use self-talk productively rather than in ways that hinder their continued effort.

Skills   Effective inclusion facilitators have a repertoire of skills and strategies that helps them influence the beliefs and actions of others in one-to-one or group situations. They know how to 1) maintain a healthy balance between advocacy and inquiry, 2) teach adult learners, 3) mediate individuals' learning over time, 4) negotiate "win-win" or "both/and" solutions, and 5) monitor and incorporate evidence into decisions about future actions.

Balancing Inquiry and Advocacy An inclusion facilitator with well-developed advocacy and inquiry skills can begin to change educational practices for students with significant disabilities by approaching individual teachers or parents, by working with groups such as students' individualized education program (IEP) teams, or through broader systems-focused efforts such as curriculum committees or a strategic planning task force. Practitioners who support inclusive education are often more skilled in advocating than in using inquiry as a means of engaging with others who do not share their values or experiences. Although expanding one's skills in inquiry does not mean abandoning the right to share one's strongly held viewpoint, such expansion can also broaden one's repertoire of dialogue that can be adapted to particular situations or individuals.

Dialogue is distinguished from discussion or debate by a focus on "reflective learning . . . in which group members seek to understand each other's viewpoints and deeply held assumptions" (Garmston & Wellman, 1999, p. 55). When individuals or groups enter into dialogue with one another, they deepen their understanding of one another's perspectives, are more likely to examine and alter their beliefs, and strengthen their relationships.

According to Sparks (2004), dialogue is characterized by a "suspension of judgment, release of needs for specific outcomes, an inquiry into and examination of underlying assumptions, authenticity, a slower pace with silence between speakers, and listening deeply to self, others, and for collective meaning." The following example demonstrates how an inclusion facilitator can balance advocacy with dialogue and inquiry.

Marie Thibideaux (pseudonym) is an inclusion facilitator who provides support to 20 students with significant disabilities who attend six schools in a large rural school district. Each week, she spends about 2 hours in each school, attending team meetings or meeting with the students' general education teachers and administrators. Marie has learned how to balance advocacy with inquiry and has positive relationships with each member of the student's team, even though they don't always agree on every issue. Recently, a student named Cameron moved from a small elementary school to a larger middle school, and Marie was involved in planning his transition. At the first meeting of Cameron's sixth-grade team, the math teacher made the following comment:

> To be honest, I don't think that this student is appropriate for my math class. We are already starting to get into algebra,

and from what I have read in his records, he has an IQ score of only 40. Wouldn't he be better off if he spent time learning the functional uses of money and time?

Marie could have responded with traditional advocacy statements, such as

- "IQ scores aren't a reliable measure of a student's intelligence. We need to have the highest expectations for Cameron despite what his test results say."

- "Cameron's IEP specifies that he will be in a general education math class. We don't really have a choice here."

- "I have known many students like Cameron who have surprised us with their knowledge once we gave them a chance in general classes."

The math teacher might then have made some retort such as, "I don't really think that we should be doing something for our students just based on unfounded 'hope' that they will benefit. I need evidence."

Marie's initial response has set up a *she said, he said* debate, in which both sides provide increasingly vehement arguments for their point of view, with no likelihood that any resolution will ever be found. Perhaps if Marie tried an advocacy or inquiry approach, using different language to respond to her colleague's comments, her efforts would have been more successful.

Advocacy: "I can understand your concern. I have worked with Cameron since he was in preschool. Would you be interested in hearing about some of the strategies teachers have used to successfully include him in challenging academic classes?"

Inquiry: "Could you give me a little background on the experiences you've had with students like Cameron?"

Advocacy: "My experience, particularly with students with significant disabilities like Cameron's, is that IQ scores have little relationship to what they can actually learn in classes. Is that your experience, or do you have a different take on this?"

Inquiry: "I wonder if you could share your thinking behind your recommendation that Cameron should learn money skills and time management as opposed to algebra?"

If Marie takes this revised approach, she shows that she has an open mind about the teacher's viewpoints, she models the behavior of questioning assumptions, and she will find out more information about the math curriculum and the teacher's approach to instruction. In addition, she has preserved her relationship with the teacher whom Cameron will have for an entire academic year.

In *The Fifth Discipline Fieldbook* (Senge et al., 1994), Ross and Roberts shared protocols for improved advocacy and inquiry. They recommended that individuals practice using sample statements that serve the following purposes:

- To make one's thinking process visible

- To test one's conclusions and assumptions

- To ask others to make their thinking visible

- To compare one's assumptions to theirs

- To deal with someone who disagrees with one's point of view

- To cope with an impasse that seems to have stalled discussion

Many conversations about inclusion seem to present as an impasse right from the start. The natural reaction is for people to continue to articulate their beliefs, raise their voices with each successive volley, agree to disagree, or finally, call for an administrator to make the decision.

Ross and Roberts offered other options that can lead people away from the perceived impasse to a point in which they can calmly consider alternative options or enter into a data-gathering phase of the problem-solving process. They suggested that change agents or facilitators use phrases such as

- What do we know for a fact?

- What do we agree on, and what do we disagree on?

- Perhaps we might state the assumptions behind our opinions.

- It seems as if we aren't going to reach a mutually agreeable decision today. What might we each do before we come back to the table to continue this discussion?

Rather than inflaming the participants' emotions, these statements serve to diffuse the situation, asking each person to use a different part of his or her brain to explore possibilities while showing a commitment to working out a win-win solution.

Teaching Adults   Acting in the role of change agent, an inclusion facilitator has many opportunities to teach others about students with significant disabilities and inclusive education. Most general education teachers have never had a student with significant disabilities in their class before, and it is unlikely that they had any preparation during college to address the needs of students who use augmentative communication, experience significant physical challenges, or have sensory differences such as blindness or deafness. Teaching other adults can take many forms, but these methods should not include lecturing or simply presenting people with facts.

Some adults may be open to listening to stories about other students that illustrate broad concepts that can be applied to a new student. Inclusion facilitators typically have strong skills in this area because they themselves were probably deeply moved by the personal stories of students and their families. The skilled inclusion facilitator walks a fine line between proselytizing and telling stories from which larger values or lessons can be learned. Other individuals may want to read about inclusive education first and then have a one-to-one discussion over coffee about the implications for their classrooms. Still others may need to see a teaching strategy demonstrated, try it themselves, and then talk about the outcome with a valued colleague.

This last teaching and learning method—giving teachers the opportunity to learn by doing and then reflect on their experience—is supported by research on innovation diffusion, reflective practice, and professional development (Hole & McEntee, 1999). Pfeffer and Sutton (2000) coined the term the *knowing–doing problem* to describe the gap between what teachers know how to do and what they actually do. They suggested that the most effective way to bridge the knowing–doing (or research-to-practice) gap is to emphasize teacher learning within the context of teaching actual lessons rather than focusing on more formal, didactic training programs. Thus, inclusion facilitators should focus on coaching others to try out new practices in their classrooms and then should spend time with them reflecting on the process and outcomes, rather than relying on presenting a workshop on the theoretical rationale for inclusive education. Table 3.1 depicts the many opportunities that inclusion facilitators have to teach others about best practices, utilizing effective professional development and change techniques.

Mediating   Inclusion facilitators have a powerful tool for effecting changes in beliefs and attitudes through their roles as medi-

Table 3.1. Opportunities for inclusion facilitators to teach others about inclusive education

Topic	Audience	Venue
Evidence-based rationale for inclusion	Teachers	Staff development workshops
		Readings distributed in mailboxes
		Study groups
Value of diversity	Students	Classroom/hallway bulletin boards
	Teachers	Assemblies that feature panels of people with disabilities and their parents
	Parents	
		Personal stories shared with others
Augmentative and alternative communication (AAC)	Speech-language pathologists	Team meetings
		Staff development workshops
	Occupational therapists	After-school demonstrations
		Opportunities within the classroom with a specific student
	Paraprofessionals	
		AAC conferences or workshops attended with other staff members
Models that support inclusive education	Administrators	School improvement committee/task force meetings
		One-to-one meetings
		Meetings between administrators from different schools
Curriculum adaptations and modifications	Teachers	Staff development workshops
	Related-services staff	State teachers' conferences
		Individualized education program team meetings
		Instructional planning meetings
Strategies for helping to support students without hovering	Paraprofessionals	Before- or after-school workshops
		Opportunities in the classroom when modeling is appropriate
Curriculum creation based on principles of universal design for instruction	Teachers	Study circles, reflective practice groups, or graduate classes held at the school
		Curriculum committees
Classroom and behavioral support strategies	Teachers	Opportunities in the classroom when modeling is appropriate
	Paraprofessionals	Collaborative planning time

ators or coaches who shine a "judgment-free flashlight, illuminating internal or external data, the examination of which may lead to self-directed learning" (Garmston & Wellman, 1999, p. 177). As a form of coaching, mediating incorporates all of the skills of good group facilitation such as paraphrasing, probing for specificity or understanding, inquiring, and presuming positive intentions (Garmston & Wellman, 1999). Inclusion facilitators who enter into

long-term professional relationships with other teachers in a school go beyond fulfilling their own roles as teachers. Over time, they will mediate the other teachers' growing understandings about inclusive education by comparing and contrasting the teachers' past and present experiences, positing new norms and testing them against traditional ones, sharing research-based information about inclusion, and addressing the teachers' practical concerns about how inclusion will affect day-to-day life in the classroom or school.

Negotiating In the ideal world, every teacher and related-services provider along with every parent, teacher, school board member, administrator, and public policy maker would enthusiastically support the goals of inclusive education and fund schools adequately. The inclusion facilitator could wave a magic wand, and doubters would become believers, resisters would cast aside their objections, and fiscal and structural barriers would be considered mere nuisances instead of roadblocks to innovation. In the real world, however, inclusion facilitators must be skilled negotiators at the same time that they are building others' support for inclusion.

Negotiation with respect to inclusion can be a tricky business. Saying, "If you agree to have this student in your class, I will bake you brownies every Friday" does not reflect the valued place that we think students with disabilities should have in general education. However, asking, "What support would you need in order for Jim to be successful in your social studies class?" acknowledges the teacher's concerns, does not forsake the idea that Jim has the right to be in a social studies class, and still underscores the collaborative nature of supports for inclusion.

Here is another effective negotiation that respects a teacher's concerns:

> *I know that you have some concerns about whether this will work for you. Would it work for you to identify your concerns about Jim being in your class so that we can address as many as we can right now? Then, perhaps we can try it out for a few weeks and come back together after that to talk about what's been working and what still needs to be done to support Jim's success in your classroom.*

The goal of all negotiation should be to craft win-win solutions. Fisher, Ury, and Patton (1991) called this *principled negotiation*, in which the interests of conflicting parties are taken into consideration to craft solutions that are acceptable to both sides—in effect

both/and rather than *either/or solutions*. Chapter 4 provides additional strategies to help inclusion facilitators deal with conflict within teams; these same strategies work equally well when the conflict is between individuals.

Monitoring The last intervention strategy is for inclusion facilitators to serve as the monitors of their students' progress and thereby help teachers or other educators make new decisions based on sound data as well as values and beliefs (Garmston & Wellman, 1999). Particularly in the current atmosphere that values evidence-based practice (e.g., Individuals with Disabilities Education Improvement Act of 2004 [PL 108-446]), inclusion facilitators must be able to gather and help interpret outcome data in a way that is meaningful to classroom teachers, parents, and administrators. In other words, when a teacher shares a belief or concern that the student "won't learn anything in my class," it is a call to an inclusion facilitator to work with the rest of the team to provide consistent and accurate supports for the student and to collect data on student learning.

DISCOVERING IDENTITIES TO
PLAN INTERVENTION STRATEGIES

So what strategies should an inclusion facilitator use to influence a given individual in a given situation? The authors of this book suggest that inclusion facilitators discover what comprises each person's identity with respect to inclusion across three dimensions

- Bottom-line values

- Concerns about inclusive education

- Personality type

Bottom-Line Values

It is likely that some individuals with whom inclusion facilitators may work will value the students' development of self-esteem or self-actualization above everything else. These teachers would probably support constructivist, experiential teaching. Some teachers may believe that the central role of education is passing down time-honored knowledge, focusing on covering the breadth of the curriculum rather than exploring a few ideas in depth. Others feel that the role of school is to teach students how to learn, given the

pace at which new knowledge is outpacing present-day knowledge. Some school personnel may hold core values about evidence-based practice, valuing only those pedagogies that have evidence of effectiveness over time. Still other individuals may think that the purpose of schooling is to right societal wrongs and to prepare students to take an active role in a democracy. These individuals might construct curriculum around a set of provocative essential questions or problems and emphasize students' growing moral consciousness to global issues.

In their work with schools in New Hampshire and other states since the mid-1980s, the authors of this book have noticed that people's bottom-line values tend to cluster within one of four dimensions (i.e., expedience, authority, altruism, social justice) that are expressed either to satisfy an ego need (*self*) or to satisfy someone else's need (*other*). Table 3.2 correlates these four value dimensions with their *self* or *other* expressions. The authors hypothesize that these are the most enduring values about inclusion—the ones that will keep people committed when the wisdom of inclusion is challenged.

Expedience Expedience guides some people's decisions about their professional behavior. The principal who acts out of concern for expedience—who makes the decision that will be easy for him- or herself—may be an initial supporter of inclusion, on the one hand, because he or she believes it will satisfy the group of parents who are ready to bring a due process claim against the school if their children are not included in general education classes. On the other

Table 3.2. How an individual's primary values affect his or her focus on "self" and "other"

Primary value	Focus on self	Focus on other
Expedience	"I'll do whatever is easiest for me and causes the least conflict."	None
Authority	"I want to live up to my own professional expectations and how I was trained."	"I'll do whatever is proven through research, whatever the law requires, or whatever my boss mandates."
Altruism	"I fear what having a disability means and would like it to be eradicated."	"I want to make life easier for people with disabilities who are less fortunate than I."
Social justice	"I want to be valued for my unique gifts and welcomed into my community and my world."	"I want everyone to be valued for their unique gifts and welcomed into our community and world."

hand, that same principal may be as easily swayed against including students because he or she envisions the extra time and effort that will have to be devoted to staff development, meetings, and one-to-one conversations that will be necessary if a change in philosophy or programs is introduced. This value dimension tends to be all about one's concern for one's self and less about concern for others.

Authority The second value dimension is that of authority, which is either internalized or externally imposed. Many veteran educators and related-services providers have strongly developed professional identities that function as internal voices of authority. These people make decisions based on their notions of what they should do as professional speech-language pathologists (SLPs), psychologists, or occupational therapists. For example, Diane is an SLP in an urban elementary school. For 20 years, she has provided articulation therapy to students with significant disabilities, and the suggestion that she change her practice to focus on students' functional communication abilities rattles the core of her identity as a competent SLP. She identifies herself as an articulation therapist, and her allegiance to the value of authority comes from within.

Other professionals who value authority are influenced by external rules in the form of law, regulations, and research. They seek to understand exactly what is expected of them from a higher authority and will not challenge their supervisor or a piece of research from a prestigious university. For example, Marsha, a special education case manager in a large high school, follows her teacher's contract or what her boss tells her during her monthly supervision meetings as the letter of the law to guide every decision she makes.

Altruism The third dimension of values around inclusion centers on people's expressed desire to be altruistic—to demonstrate their unselfish concern for the welfare of others. Altruism toward people with disabilities is rooted in the self as an expression of fear about people with disabilities (or about being disabled themselves) or in feelings of benevolence toward others who are perceived as needing one's help or charity. Each expression of this value is harmful toward many people with disabilities who "no longer see their physical or mental limitations as a source of shame or as something to overcome to inspire others" (Shapiro, 1993, p. 4).

In his landmark investigative study of the disability rights movement in the United States, *U.S. News and World Report* re-

porter Joe Shapiro interviewed hundreds of people with disabilities throughout the country, many who were active in the movement as well as those who did not consider themselves to be at all political. The resounding message he received was that the vast majority of people with disabilities do not want pity or charity because they do not see any tragedy in having a disability but rather view "society's myths, fears, and stereotypes [as making] being disabled difficult" (Shapiro, 1993, p. 5).

Although most people without disabilities would not recognize it, some argue that fear is the root of compassion toward people with disabilities. Robert Murphy, an anthropologist with a disability, wrote

> We are subverters of the American Ideal just as the poor are betrayers of the American Dream. The disabled [sic] serve as constant, visible reminders to the able-bodied [sic] that the society they live in is a counterfeit paradise, that they too are vulnerable. (1993)

This reminder of vulnerability often gets turned outward and expressed as concern or benevolence toward people with disabilities. To some, programs and events such as the Jerry Lewis Muscular Dystrophy Telethon, The Walk to Cure Autism, and the donation cups at local convenience stores to raise money for a segregated school for children with disabilities express the belief that disability should be eradicated because having a disability is a horrible existence, barely worth living (McBryde Johnson, 2003).

Norman Kunc (1995), a social activist who experiences a disability, described four levels of society's perceptions about and response to disability, including

- Disability as deviance, expressed as extermination, aggression, segregation, and avoidance

- Disability as deficit, expressed through rehabilitation, remediation, and assimilation

- Disability as tragedy, expressed as tolerance, patronization, and charity

- Disability as diversity, expressed as respect, appreciation, equal worth, and inclusion

Kunc and others who have first-hand experience with disabilities embrace only the last perspective and demand that having a disability be considered to be a natural part of the human experience. They

argue that people with disabilities should be given choice and control over their lives (as exemplified by the precept "Nothing about us without us") and that they should be guaranteed full access to education, employment, housing, medical care, recreation, and relationships (Charlton, 1998; Snow, 2000).

Social Justice   The value of social justice represents both self-interest and a legitimate interest in the rights and opportunities of others. Thus, it is a powerful value for inclusion facilitators to promote toward students with disabilities or any other difference.

Kunc (2003) has pointed out that "inclusion is in everyone's self-interest." He illustrated that point with a parable called "The Story of the Stranger." In this parable, the star of the basketball team is riding a wave of adulation from his peers, his coaches, his teachers, and the community because he has led the team to the state championship. During the week before the big game, pep rallies celebrate his skills, cheerleaders chant his name when he comes up to the podium during an assembly, and the local newspaper asks, "Can Scott lead the Panthers to their first state championship since 1954?"

Kunc then asked a provocative question: As Scott dribbles the ball toward the basket during the final seconds of play when the score is tied, is he thinking, "I'm the big man on campus; the world is my oyster; I really have it made?" Kunc's answer helps us understand that Scott's experience is really no different from that of the kid with Down syndrome who wishes he could be on the basketball team. Scott fears that his value to the team and the school hangs in the balance because if he doesn't make the basket, he is no longer the golden boy. People won't remember his previous 3 years of success but instead will remember the newspaper headline proclaiming that the Panthers went down in defeat in the final seconds because he failed to make the shot.

Kunc argued that all students—Scott, the prom queen, the valedictorian, and the kid with Down syndrome who is teased on the bus—want to live in a society in which they are accepted for who they are as people, not for what they look like, the score they got on their SATs, or their prowess on the basketball court. Kunc said that one of the strongest arguments for social justice for *others* is that in a just society—one that "recognizes inalienable rights and adheres to what is fair, honest, and moral" (Cunningham, Cunningham, & Saigo, 2003)—each of us can be confident that the world will be just toward *us* as well.

Concerns About Inclusive Education

Highly experienced and respected teachers may have reservations about inclusive education. One English teacher revealed during a team meeting that his reticence about having a particular student in his class really centered on what this decision would mean for his day-to-day responsibilities. He expressed general support for the philosophy of inclusion but was deeply concerned about the extra planning time required, the effect that this student would have on his usual teaching methods, and the challenge of classroom management. In this type of situation, the school's inclusion facilitator needs to take this teacher's concerns into consideration before expecting him to be on board with an inclusion decision or to invest his energy in its implementation.

The ability to address the concerns of others about an innovation has long been recognized as being an essential skill of effective change agents. In 1973, Hall, Wallace, and Dossett first wrote about the developmental stages of the process of adopting educational innovations that they called the CBAM. Their model included three dimensions: the concern that potential users express about the innovation, how the innovation is used, and the ways that the innovation can be adapted to the needs and styles of different people. Hall and Loucks (1978) applied the work of Hall and colleagues to the challenge of designing staff development based on teacher concerns. There are lessons in their work for inclusion facilitators in their role as change agents.

Hall and Loucks identified several assumptions about adopting innovations that have relevance to inclusive education, such as

- Change is a process, not an event; it takes time and is achieved in stages.

- The individual must be the primary target of interventions designed to facilitate change.

- Change is a highly personal experience, with the personal dimension being more important to address than the organizational one.

- Individuals go through many stages during the adoption of the innovation, and change agents must accommodate their strategies to each stage, constantly assessing each individual's perceptions relative to the movement of the whole organization.

Research on the CBAM has identified seven stages of concern about an innovation, depicted in Table 3.3. These stages of concern about inclusion are represented by the following statements:

- "I'm not really familiar with the term *inclusion.*" (*Awareness*)

- "I think that we are going to be talking about that in a class that I'm taking toward my master's degree." (*Informational*)

- "I've got so much on my plate now that I don't think that I really have the time to invest in this effort right now." (*Personal*)

- "The planning time required is really more than I can handle, and I'm not sure if it makes sense for me to devote so much time and energy to one student." (*Management*)

- "Things seem to be going all right, but I wonder how this is going to affect my students' grades this semester." (*Consequences*)

- "Maybe if we met less frequently, but for a longer block of time, it would be more efficient and effective for everyone on the team." (*Collaboration*)

- "This just makes so much sense for all students. Can we talk to the Curriculum Committee about introducing some of the things we are doing in other classes?" (*Refocusing*)

Inclusion facilitators who take individuals' concerns into consideration recognize that "since change is brought about by individuals, their personal satisfactions, frustrations, concerns, motivations, and perceptions generally all play a part in determining the success or failure of a change initiative" (Hall & Loucks, 1978, p. 38).

Table 3.3. Stages of concern about an innovation

Stage number	Stage or level of concern	Characteristics demonstrated by individuals
0	Awareness	Little concern about or interest in the innovation
1	Informational	More interest in learning about the innovation, such as the general characteristics, effects, and requirements for its use
2	Personal	Uncertainty about the demands of the innovation, one's capacity to make the innovation work, and one's role in the process
3	Management	Focus on the innovation's effects on specific tasks, efficiency, scheduling, time, and energy
4	Consequences	Beginning of consideration of the impact of the innovation on students
5	Collaboration	Eagerness to work with others who are involved in the same innovation
6	Refocusing	Openness to implementing new programs to replace the old

Source: Hall, Wallace, and Dossett (1973).

Personality Type

The third component of identity that inclusion facilitators need to take into consideration is a person's basic personality type. Numerous models of personality typing have been described (Myers & McCaulley, 1985), but one that has been used successfully by the author of this chapter is the Enneagram (Riso & Hudson, 2003). The *Enneagram* is a dynamic personality system that is founded on a number of ancient traditions originally synthesized by Oscar Ichazo and describes nine distinct patterns of thinking, feeling, and acting (Ichazo, 1982). Each of the patterns is based on a perceptual filter that determines what people pay attention to and how they direct their energy. Each pattern is supported by a basic proposition about what is needed for survival and satisfaction. Thus, understanding individuals' personality types can be a powerful tool in learning *what* motivates them, *where* their attention goes during stress, *how* to effectively communicate with them, and *how* to maximize group development and manage conflict.

The Enneagram is based on a number of assumptions about personality typing:

1. People have a dominant type that does not change from one situation to another.

2. The personality types are universal, applying equally to men and women from diverse cultures.

3. People fluctuate among healthy, average, and unhealthy expressions of their dominant type.

4. No type is inherently better or worse than any other, each having capacities and limitations.

5. The purpose of the using the Enneagram is not to change people's personality types, but rather, to enable them and others to use the healthy behaviors of each type in the appropriate situation.

Assessing people's personalities using the Enneagram is easily accomplished by having each person take an inexpensive on-line assessment available at http://enneagraminstitute.com. Staff members and teams that have used this personality test have found that it gave them insights into their interactions with other personality types.

The nine personality types are described as follows:

*   *The Reformer*—a rational and idealistic type who is principled, purposeful, self-controlled, and perfectionistic

- *The Helper*—a caring and interpersonal type who is generous, demonstrative, people pleasing, and possessive

- *The Achiever*—a success-oriented and pragmatic type who is adaptable, excelling, driven, and image conscious

- *The Investigator*—an intense and cerebral type who is perceptive, innovative, secretive, and isolated

- *The Loyalist*—a committed and security-oriented type who is engaged, responsible, anxious, and suspicious

- *The Enthusiast*—a busy and fun-loving type who is spontaneous, versatile, acquisitive, and scattered

- *The Challenger*—a powerful and dominating type who is self-confident, decisive, willful, and confrontational

- *The Peacemaker*—an easygoing, self-effacing type who is receptive, reassuring, agreeable, and complacent

In addition to describing individuals' dominant personality types, the Enneagram also accounts for each person's second side of his or her personality, which can either complement the dominant type or contradict it; level of development along a healthy-average-unhealthy continuum; tendencies when feeling secure or threatened; and basic instincts that lie at the heart of the quest for survival.

Using the Enneagram to understand personality type is far more complex than taking a 10-question magazine quiz titled "What Kind of Person Are You?" Change agents may find the Enneagram approach to be a powerful tool, however, as they strive to understand the most effective ways to work with the diverse individuals on a student's team.

APPLYING THE MODEL

The following case study illustrates how an inclusion facilitator might use the model described in this chapter to engage with others in the school community to promote inclusive values and beliefs.

The School

Lakeside Middle School houses approximately 1,200 students in fifth through eighth grades. All students are organized into teams—consisting of instructors in core academic areas, guidance counselors, and special educators certified in mild disability areas—within each

grade level. Faculty in the arts, health, physical education, and information technology teach students across all grade levels.

The service delivery model for students with disabilities is best described as a traditional least restrictive environment model. Most students with learning disabilities are part of heterogeneous social studies, science, and related arts classes but are taught language arts and math in pull-out classes by teachers certified in learning disabilities. Students with serious emotional disabilities or those with significant cognitive disabilities are educated primarily in self-contained classrooms and mainstreamed for one or two periods a day into arts or physical education classes.

Within the last few years, a few students with significant disabilities have been included in more general education classes, but there is no schoolwide vision for full inclusion. The teacher who instructs students with severe disabilities and the districtwide inclusion facilitator are philosophically supportive of inclusive education and see themselves as the change agents of the school.

The Student and Parent

Student   Ben is a 13-year-old student at Lakeside Middle School who has autism.

Parent   Hillary, Ben's mother, is concerned primarily with her son's learning vocational skills. She works as a paraprofessional in another school in the Lakeside school district and is not supportive of Ben's full inclusion in general education.

The Staff

Inclusion Facilitator   David is the districtwide inclusion facilitator and was a general education classroom teacher until his career switch 3 years ago. David provides assistance to six schools across the district and spends approximately 2 days a week at Lakeside Middle School. David sees himself as an inclusion advocate who aggressively pursues ongoing professional development to improve his skills. He has an adult son, Pete, with a developmental disability who lives and works in the community.

Principal   Steve is a veteran educator who has spent nearly 20 years at Lakeside Middle School. He has instituted a number of

reforms at the school within the last 5 years, including advisory groups, a service learning requirement, interdisciplinary teaching of English and social studies, and an alignment of the school curriculum to comply with state standards. He is concerned because his school has been notified that it is in need of improvement because of the low statewide assessment scores of its students who are receiving special education services.

Special Education Coordinator Kevin is in his second year as the coordinator of special education at the middle school and has been a special educator for 18 years. He reports to the principal and to the district special education director. Most of the staff members he supervises in his new role as coordinator were peer colleagues before he was promoted.

Special Education/Severe Disabilities Teacher Jeff has been a special educator for 22 years and has worked for most of his career in self-contained classrooms for students with significant cognitive disabilities. Three years ago, his job was changed to include both teaching students with moderate and significant disabilities in a pull-out classroom and planning and collaborating with general and special education team members.

Science Teacher Dan is a sixth-grade science teacher who has been with the school for 8 years. He has no training in special education but prides himself on his creative teaching methods. He is one of the most popular teachers in the school. He has never had a student with significant disabilities in his class.

Paraprofessional Delores is a one-to-one paraprofessional who supports Ben in his participation on a part-time basis during science and social studies in sixth-grade classes. Delores does not have any training in special education although she worked for many years in a group home for adults with disabilities. She is not particularly supportive of Ben's inclusion into general education classes. She has a close personal relationship outside of school with Ben's mother, Hillary.

Speech-Language Pathologist Deborah is a veteran speech-language pathologist who has worked in schools providing pull-out speech services to students for approximately 20 years. She has a caseload of approximately 60 students, including 3 who have significant disabilities and are candidates for augmentative communication.

Life Skills Teacher   Maxine is a special education teacher who provides classroom life skills and community-based instruction to students with significant disabilities. She has been in the field for approximately 25 years.

Assessing Staff Identities

In his role as the district inclusion facilitator, David is committed to fully including all students in age-appropriate general education classes in their neighborhood schools. He is responsible for providing expert facilitation to teams across the district. His students include those who qualify for the state's alternate assessment, those who have significant physical and sensory disabilities, and those who could benefit from augmentative and alternative communication (AAC). David understands that Ben's team is very diverse, not only in terms of their professional roles but also, presumably, in their values, concerns, and personality styles. He has a number of tools at his disposal to assess the team members across these identity dimensions, including conversational and observational assessments, informal assessments conducted via written surveys, and other valid and reliable assessment instruments.

Assessing Values   Assessment of a person's values about students with significant disabilities and inclusion is best accomplished by getting to know him or her as an individual. This is best accomplished by paying attention to conversations in team meetings and informal chats in the hallway, and by observing the person's interactions. Does the person talk to the student with a disability as if the student understands what is being said, or does the person use baby talk or talk about the student as if he or she were not present? Does the person speak about a future life for the student that is characterized by college, work, and community living, or does the person assume that the student will live in a group home or in an institutional setting? Does the person describe the student in person-first language, emphasizing his or her gifts and talents and unique personality traits and characteristics, or does the person focus on the student's impairments, using phrases such as "low functioning," "severely involved," or "wheel-chair bound." An inclusion facilitator should not make assumptions based on only one or two conversations but should attempt to find out the basis of the person's assumptions.

Jorgensen, McSheehan, and Sonnenmeier (2002) described indicators of positive values toward students with disabilities within a

larger document that lists essential best practices in inclusive schools. One method of uncovering beliefs and assumptions might be to ask team members to read this document and then discuss it through open dialogue.

   Assessing Concerns   Assessing concerns about inclusion can be accomplished by asking team members an open-ended question, "What concerns you about including Ben?" or by creating an informal survey such as that depicted in Figure 3.1. An inclusion facilitator should not use the ratings from this instrument as if they were scores on a statistically valid and reliable instrument, but the ratings can illustrate the approximate level of concern expressed by the different members of a student's team.
   The most formal and precise measure of stages of concern is the SoC (Stages of Concern) Questionnaire (Hall, George, & Rutherford, 1977). This questionnaire, which assesses concern about any innovation (not specifically inclusion), is psychometrically rigorous and can provide the inclusion facilitator with meaningful data for planning his or her change strategy.

Results of Team Member Identity Assessments

David decided to use a combination of strategies to identify the values, concerns, and personality types of Ben's team members. He used his own observational and conversational assessment of their values, surveyed the team for their concerns using the questionnaire depicted in Figure 3.1, and had each staff member take the on-line Enneagram test. Table 3.4 depicts the results of these assessments. Examining this team's identities yields several interesting observations.

1. Four members' primary values lie in authority—what they judge has been proven by data or what their supervisor mandates.

2. The **inclusion facilitator** and the **special education teacher** could be natural allies because they both value social justice and are at levels 5 and 6 on the concerns scale. They must be cautious about moving too far ahead of the other team members, however, because most of them are concerned about the personal and management impact of inclusion and will need to have those concerns addressed before they will be open to rethinking their assumptions or adjusting their values.

3. The **parent** is the only person on the team who is a *Challenger*. The **special education coordinator** and **life skills**

Concerns About Inclusive Education Questionnaire

Directions: This is an anonymous questionnaire. Please read each statement below and then rate each statement according to the following scale:

1 = It is unlikely that I would make this statement.
2 = It is somewhat likely that I would make this statement.
3 = It is very likely that I would make this statement.

_____ 1. I don't think inclusion will work in my class. I don't have any training in special education or experience working with students who have significant disabilities.

_____ 2. I know our school has been doing some inclusion, but I'm not really sure how it would affect me.

_____ 3. I'm going crazy with all these meetings and adapting all these teaching materials. I find that I am spending too much time on the one or two students in my classroom who have significant disabilities.

_____ 4. I wonder if we could have more informal discussions about inclusion with other teachers. I know it would help me do a better job if I could hear what is working for them.

_____ 5. So far, having a student with disabilities in my class is working out fine. The other students seem to be eager to work with him or her, but I wonder how this will affect his or her learning and theirs?

_____ 6. I think we've made a good start with a few students who have been included. I think that now we need to take a look at all the students with more significant disabilities and develop a schoolwide plan for including them.

_____ 7. Inclusion? I think that there are some students who will always be best served in a self-contained classroom.

_____ 8. Being in class with a student who has a significant disability has helped my students become more tolerant. Still, I wonder how my attention to this student has affected their mastery of the curriculum.

_____ 9. It's been great to have the special education teacher meet with me to do lesson planning for one of my students with significant disabilities. Do you think that we could have more common planning time so that we could develop whole units based on differentiated instruction?

_____ 10. I think I understand the concept of inclusion—it's really for social reasons, isn't it? I'm not really sure what it means in terms of academic learning, though.

_____ 11. Other: _____

Figure 3.1.   Concerns about inclusive education questionnaire.

teacher are *Peacemakers* who will be reticent to challenge Ben's mom.

4.   The **special education coordinator** is primarily concerned with making his job easy and with not "rocking the boat." He will not be eager to take a stand for inclusion unless his values change or unless it can be proven that his job will actually be easier if students are included.

Table 3.4 Results of team member identity assessment

Team member	Primary values	Major concerns	Personality type
David (inclusion facilitator)	Social justice, self, others	*Stage 6 (refocusing)*— concerned with persuading others to replace current programs and practices with full inclusion	*Helper*—caring, interpersonal, generous, demonstrative, people pleasing, possessive
Steve (principal)	Authority, self, professional competence, others, evidence-based practices	*Stage 4 (consequences)*— concerned with considering the impact of inclusion on student learning	*Investigator*—intense, cerebral, perceptive, innovative, secretive, isolated
Kevin (special education coordinator)	Expedience, self, "making it easy for me"	*Stage 3 (management)*— concerned with focusing on the effects of inclusion on time, schedules, and staffing	*Peacemaker*— easygoing, self-effacing, receptive, reassuring, agreeable, complacent
Jeff (special education teacher)	Social justice, others, equity for students with disabilities	*Stage 5 (collaboration)*— concerned with the effects of inclusion relating to his ability to work with others	*Loyalist*—committed, security-oriented, engaged, responsible, anxious, suspicious
Dan (science teacher)	Altruism, others, benevolence toward students with disabilities because they are less fortunate than others	*Stage 3 (management)*— concerned with focusing on the effects of inclusion on time, schedules, and staffing	*Enthusiast*—busy, fun loving, spontaneous, versatile, acquisitive, scattered
Hillary (parent)	Altruism, others, benevolence toward students with disabilities because they are less fortunate than others	*Stage 4 (consequences)*— concerned with worrying about Ben's skill acquisition	*Challenger*—powerful, dominating, self-confident, decisive, willful, confrontational
Delores (para-professional)	Authority, others, whatever her boss or Ben's mother tells her to do	*Stage 2 (personal)*— concerned with worrying about her role in the middle between the school and the parent	*Helper*—caring, interpersonal, generous, demonstrative, people pleasing, possessive
Deborah (speech-language pathologist)	Authority, self, professional competence	*Stage 4 (consequences)*— concerned with worrying about Ben's skill acquisition	*Achiever*—success-oriented, pragmatic, adaptable, excelling, driven, image-conscious

Table 3.4. *(continued)*

Team member	Primary values	Major concerns	Personality type
Maxine (life skills teacher)	Authority, others, following the orders of the special education coordinator	*Stage 3 (personal)—* concerned with worrying about the demands on her time and on her relationship with her boss	*Peacemaker—* easygoing, self-effacing, receptive, reassuring, agreeable, complacent

Note: Although only the dominant personality types are reported here, effective use of the Enneagram requires consideration of the entire assessment that includes a person's secondary type, instincts, and level of development within the type.

Planning the Inclusion Facilitator's Strategy

After about the first month of school, David feels as if he has enough information about Ben's team members to begin to work with each of them through a balanced advocacy and inquiry approach and to address their concerns about Ben's inclusion. First, however, he needs to look inward to understand his own values, concerns, and personality type.

David's values are grounded in a wish for social justice and equity for all people. He does not feel sorry for the students with significant disabilities that he supports, and he works toward their full participation and learning instead of toward remediating their impairments. He changed careers a few years ago and earned an additional teaching certification in severe disabilities just so that he could be part of the movement to include all students in the mainstream of general education. Because his values are grounded in his own personal life experience as a parent of a child with a disability, David has credibility with the team and with other parents of children with disabilities. His easygoing *Helper* personality indicates that he forms relationships easily and understands the importance of strengthening the relationships among Ben's team members. He is accepting of others' viewpoints and life experiences and does not judge them harshly if they differ from his own; however, he must be careful not to let his tendency to please others get in the way of expressing his own viewpoints or engaging others in conversations that challenge assumptions.

The major foci of his work with each team member are described next.

Principal   Steve is primarily motivated by what research says will improve all students' performance in his school. Because his

personality type is that of an *Investigator*, he will respond well to information from the research literature on the outcomes of inclusion for students with and without disabilities. David might share with Steve excerpts from three research syntheses: McGregor and Vogelsberg's (1999) *Inclusive Schooling Practices: Pedagogical and Research Foundations*, Ryndak and Fisher's (2003) *A Compendium of Articles on Effective Strategies to Achieve Inclusive Education*, and Fisher and Ryndak's (2001) *The Foundations of Inclusive Education: A Compendium of Articles on Effective Strategies to Achieve Inclusive Education*. Steve might also be interested in reading a book on school reform and inclusive education, such as Lipsky and Gartner's (1997) *Inclusion and School Reform: Transforming America's Classrooms*. Because Steve is very busy, David might put together a brief annotated bibliography summarizing some key books and journal articles. Steve might also support David's starting of an action research group at Lakeside to study research on various instructional and support strategies. Finally, because Steve will likely be paying close attention to how well students with significant disabilities do on the statewide assessment, David tells Steve about another student with significant disabilities who was one of only seven sixth-grade students to score in the advanced category of the assessment during the previous year.

Special Education Coordinator   Kevin's values play out in his wish to keep the status quo so as not to do anything that will make his job more difficult. Kevin will respond best if David can present a well-thought-out plan for how including all students will favorably affect each and every staff member, their planning time, their relationships with students' parents, and Kevin's role during the change process. Kevin might benefit from visiting other middle schools and talking with their special education coordinators. Because David is part of a statewide network of parents and educators who meet regularly to talk about inclusion, he could invite Kevin to a meeting of that group, facilitate a visit to another school, and invite one of Kevin's peers to visit Lakeside.

Special Education Teacher   Jeff is David's closest ally on the special education staff, and David should enlist him as a partner in the inclusion change process. Because Jeff's dominant personality type is that of a *Loyalist*, David will have to provide close support and mentoring to Jeff so that the stresses of the change process do

not push him to express the unhealthy sides of his *Loyalist* personality (i.e., anxiety, suspicion). David would be well served to meet with Jeff on a weekly basis to discuss issues that are surfacing within Ben's team. Jeff is anxious to learn new skills, and the meetings with David could focus on discussing student supports and on strategies for getting Ben's team to work together in a more effective and efficient way.

Science Teacher Dan has the potential to be a great teacher for all students. His lack of experience with students with significant disabilities makes him feel incompetent, however, and he is therefore likely to assert, "I don't think Ben belongs in my class." Because he is an *Enthusiast*, he teaches in a very active, yet spontaneous way; this teaching style might be challenging for Ben if he doesn't have the right supports in place. Dan's concerns center on the management of inclusion, and he asks questions such as

- "Do I have to design a special lesson just for Ben?"

- "What will happen when we use the lab equipment? I like to give my kids quite a bit of freedom, but I still need to be real cautious about safety issues."

- "It's kind of hard for me to predict exactly where I'll be in my curriculum on any particular day. It's important to me that I am able to change my lesson plan at the last minute to capitalize on something that happened on the news the night before or on a question that a student has asked. If Ben is there, will that restrict my ability to be flexible?"

David should focus on giving Dan just the amount of information that he is asking for and not overwhelming him with details. David must address Dan's concern about his creative teaching style and assure him that he will not have to miss any teachable moments just because Ben is in the class. The most effective collaboration strategy with Dan will be for David to ask him about the big themes of upcoming units, the instructional routines that Dan uses regularly, and the materials that the students will be using during those routines. Trying to pin Dan down to find out exactly what lesson he will be teaching on a certain day just will not work; therefore, to fit in with Dan's teaching style, David will have to provide extensive support to Delores (paraprofessional) so that she learns to use a repertoire of support strategies that will work across many different lessons or routines.

If David can show Dan that Ben is more similar to his other students than he thought, Dan will be able to welcome Ben into his class and provide him with a rich science learning experience.

Parent   Hillary is potentially one of David's strongest allies for Ben's inclusion, but at the present time her energies are focused on assuring that Ben acquire traditional functional skills. She wants Ben to learn to dress himself; eat appropriately; and perform repetitive tasks such as sorting, which she believes will help Ben get a job someday. Hillary does not believe that Ben has the capacity to learn academic content and frequently refers to him as "low functioning," "retarded," and "still my little baby." Her vision for Ben's adult life is that he will live at home after high school and then move to a group home in his mid-20s. She envisions him being surrounded by human services workers and has never imagined that he might travel, go to college, fall in love, or exercise control over his own destiny. Therefore, David's primary goal with Hillary should be to expand her idea of what is possible for her son and what his school experience should look like given these new possibilities. David should also be conscientious about including Hillary in all decisions regarding Ben's educational program and especially in discussions of Ben's successes within those general education classes in which he is enrolled.

Hillary has expressed that she is open to finding an adult mentor for Ben, someone who has a disability who could take Ben under his wing, so to speak, and help him make the transition from school to adult life. David's son, Pete, might be a perfect candidate because he experiences some of the same challenges as Ben and also was not expected to learn much in school. Pete is now living with a roommate in the community, working two jobs, and enjoying an active social life. In fact, Pete recently celebrated his 30th birthday by taking a hot air balloon ride and then going out dancing with his friends. Linking David's son with Ben would provide opportunities for David to get to know Hillary outside of the formal school environment. It would also allow Hillary to see the positive and challenging sides of Pete's life in the community, so she would have a better understanding of what Ben's life might be like. Finally, it would also be good for David to see the positive and challenging sides of his son's life.

Another strategy for working with Hillary would be to suggest that she attend their state's Partners in Policymaking Leadership Series (see http://partnersinpolicymaking.com). Established in Min-

nesota by the Governor's Council on Developmental Disabilities in 1987, Partners is an innovative, competency-based leadership training program for adults with disabilities and parents of children with developmental disabilities. It is designed to help individuals and parents expand their vision of what is possible, learn about best practices, and acquire competencies for influencing public officials through personal action and community organizing.

Because Hillary is a very involved community member who values good works, this might be a productive outlet for her leadership that might change her assumptions about Ben's education and life after high school. In New Hampshire's Partners series, for example, participants have heard such speakers as Norman Kunc (a social activist who experiences a disability), Jeffrey Strully (a parent of three adult children with disabilities and a nationally known author and speaker), other adults with disabilities who moved from institutional to community life, and other parents whose children have been successfully included.

Paraprofessional   Helping Delores change her views may well be the most difficult challenge facing David. Delores' dominant personality type is that of a *Helper*, and she has a long history in the human service industry working with adults with disabilities who live rather restrictive lives. Like many school paraprofessionals, she works 29.5 hours per week—just under the 30 hours that would make her eligible for benefits—so she is not eligible for school-funded professional development. Delores is very attached to Ben, and David wonders about the likelihood of her shifting her role from providing for most of Ben's needs to that of facilitating natural supports for Ben from other adults and his classmates.

David's most powerful strategy might be to connect Delores with other paraprofessionals who are supporting students who are fully included. He could accomplish this by finding a substitute aide and some discretionary funding so that Delores could attend a three-session workshop series on "The Role of the Paraprofessional in the Inclusive Classroom" being offered by the state's Parent Information Center. In this setting, Delores would be among her peers, no administrators would be present, and she could relate to the instructors, who themselves had been paraprofessionals with students whose challenges were similar to Ben's.

If Delores would be open to reading or watching a video about inclusion and the paraprofessional's role, David might lend her his book by Mary Beth Doyle (2002) titled *The Paraprofessional's Guide*

to the *Inclusive Classroom* or a video such as *High School Inclusion: Equity and Excellence in an Inclusive Community of Learners* (Institute on Disability, 1999), *Petroglyphs* (Institute on Disability, n.d.), or *Voices of Friendship* (Institute on Disability, n.d.).

Speech-Language Pathologist   Although Deborah appears to be working against Ben's inclusion—by focusing her services on pull-out articulation and language therapy—she is actually another potential ally for David if she adopts a new role on Ben's team. She has a strong work ethic, takes her professional role very seriously, and could be an important key to Ben's inclusion in the general education classroom.

Because he is not an SLP, David is not positioned to influence Deborah's professional identity; still, he might be well advised to bring an outside expert in augmentative communication into Ben's team to help with Ben's 3-year reevaluation. This expert could share with Deborah some of the latest research on AAC and related recommendations from national professional organizations, for example

- "Guidelines for Meeting the Communication Needs of Persons with Severe Disabilities" (National Joint Committee on the Communication Needs of Persons with Severe Disabilities, 1992)

- *Communication Supports Checklist for Programs Serving Individuals with Severe Disabilities* (McCarthy et al., 1998)

- "Augmentative and Alternative Communication Knowledge and Skills for Service Delivery" (American Speech-Language-Hearing Association, 2002)

Life Skills Teacher   Although Ben attends Maxine's self-contained life skills class one period per day for cooking instruction, she has no interest in exploring the possibility of Ben's being included in the regular sixth-grade consumer and family sciences class. Maxine learns best when she can see specific alternatives to her present practices. Therefore, David might decide to sit down with Maxine to plan for Ben's participation in a cooking lesson within a general education class and then model the process of providing supports for Ben in another class in which Ben is included. Because Maxine has never served in the role of team teacher or inclusion facilitator, she would need to talk through what that role shift would mean for her, the implications for her schedule, and the reaction of Jeff, the special educator, to a change in Maxine's responsibilities.

A Final Word About Social Justice
and Transforming Hearts and Minds

Each of the members of Ben's team and the whole school staff
would benefit from exploring how the concept of social justice
aligns with the practice of inclusive education so that they might
develop enduring values that can withstand the challenges experi-
enced during any innovation. Years ago, it was common practice for
schools to host a Disability Awareness Day that featured explo-
ration activities such as having students without disabilities use a
wheelchair for a day, smearing a pair of eye glasses with Vaseline
and then trying to read, or trying to write while making small cir-
cles with one's foot. These experiences were supposed to heighten
awareness of the struggles that children with disabilities face, lead-
ing to greater empathy and tolerance for their presence in schools
and communities. The impact of these activities was often short-
lived, however, and they did not lead to more reciprocal relation-
ships between students or to a change of heart about people with
disabilities or inclusive education.

David might try a host of different strategies to focus the stu-
dents and staff on issues of equity and social justice for students with
disabilities. First, David might join the school's committee that is
addressing issues of school culture and safety. As a member of that
committee, he could share resources with the other members,
including books such as *No Pity* (Shapiro, 1993) and *You Can't Say
You Can't Play* (Paley, 1993). The committee might be interested in
thinking about how to embed consideration of diversity into the cur-
riculum through readings in popular literature (e.g., *The Curious
Incident of the Dog in the Night-Time* [Haddon, 2003]), by address-
ing the civil rights issues of people with disabilities in social studies
(e.g., by contrasting the Americans with Disabilities Act of 1990 [PL
101-336] with Civil Rights legislation), and by asking students to
wrestle with dilemmas in science (e.g., Would the world be a better
place if we could genetically engineer the "perfect" person?).

If David could partner with his state's Developmental
Disabilities Council, Parent Information Center, or University Cen-
ter for Excellence in Disability, they might sponsor a school assem-
bly with a nationally known speaker such as Norman Kunc, Jeffrey
Strully, or Jamie Burke (a young man with autism). Having a follow-
up panel presentation by local self-advocates could provide a pow-
erful glimpse into the lives of people who have discarded Kunc's
"disability as deviance" paradigm for one that recognizes that

If we are to achieve a richer culture, rich in contrasting values, we must recognize the whole gamut of human potentialities, and so weave a less arbitrary social fabric, one in which each diverse human gift will find a fitting place. (Mead, 2001, p. 300)

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