

Comparative Classroom Studies towards Inclusion

Joint Research Plan for Cooperation between the Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb and Oslo

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Introduction

Research cooperation is the main concern of the joint project conducted by the Universities of Belgrade, Ljubljana, Sarajevo, Skopje, Tuzla, Zagreb and Oslo (WB 04/06, 2006). The common research theme deals with development towards the inclusive school. Inclusion is the global policy prescribing development towards a local regular school that welcomes all children with their unique individual characteristics, interests, abilities and learning needs; all children with and without special needs and disabilities; a school combating discriminatory attitudes, and offering meaningful and individually adapted education to every pupil within the community of the class (Frederickson & Cline, 2002; Johnsen, 1998/2000; UNESCO, 1994).

Inclusion is one of the key principles in the on-going developmental process of democracy (in all countries). Thus it is directly connected to human rights and equality for every single citizen, as stated in the Convention of the Rights of the Child (UN, 1991), the Standard Rules on the Equalisation of Opportunities for Persons with Disabilities (UN, 1994), the Salamanca Statement and

Framework for Action on Special Needs Education (UNESCO, 1994) and the subsequent UN Convention on the Rights of Persons with Disabilities (2006). Furthermore, from a societal perspective, the principle of inclusion is related to other, more firmly rooted criteria for the democratic welfare society, such as tolerance, communication and dialogue, cooperation, solidarity and care (Askildt, 2004; Befring, 1997; Benhabib, 1994; Buber, 1947; Dewey, 1916/2002; Habermas, 1999; Kristiansen, 2003, L 97; Noddings, 1992; 2003). Regarding the joint arenas of regular and special needs education, the inclusive school principle applies in relation to the coexistence and cooperative learning undertaken by pupils, including those with and those without special educational needs and disabilities. However, in its expanded meaning as applied in UNESCO contexts, inclusive education also comprises educational equality between genders, ethnic and cultural differences, minorities, the economically disadvantaged and all other vulnerable groups (UNESCO, 2000; 2000a). School is a fundamental societal institution with the official responsibility of forming new generations to independent and responsible citizens. Therefore, in light of this important mandate, it is surprising how little attention school has been paid in international research on reconciliation mechanisms and democracy building.

This project is a more systematically focused continuation and extension of a former SØE 06/02 project in cooperation between the Universities of Tuzla, Sarajevo and Oslo; a project with a number of activities aiming towards inclusion, that may be regarded as a pilot project for promoting cooperation in this field between Norway and Bosnia-Herzegovina. (See literature from SØE 06/02: Ćišić et.al. (eds.), 2004; *Defektologija*, 2005; Johnsen (ed.), 2005; Johnsen, 2007; Johnsen, Zecic & Babic et al (eds.), in press; *Naša Škola*, 2005; and related Master theses, articles and chapters about the project (Aðalsteinsdóttir, 2005; Pavlovic, 2005; Pepeljak, Begić & Buljubašić, 2005; Ruud, 2005; Smajic, 2004; Zekic, 2004).

This study focuses more precisely on the following aspects of the former project:

- To investigate the on-going upgrading process of inclusive practices in the regular school
- To investigate further two specific qualities of the inclusive school introduced through innovation activities under the following concepts (*Defektologija*, 2005; Johnsen, 2005; in press; *Naša Škola*, 2005):
 - The classroom as a socio-emotional safe haven
 - The creative school for all

- To investigate how regular and special needs teachers and educators (defectologists) cooperate in planning, implementing and assessing individual educational plans related to a class or group
- To continue cooperation within research methodology and theory, focusing on qualitative approaches and action research

Joint objective of comparative classroom studies towards the inclusive school

The objective of the joint classroom studies is to identify and examine teaching and learning activities in regular classes related to development of inclusive practices towards the school for all. The studies mainly focus on ways in which schools implement and develop inclusive practices, the overall research questions being: How does school teach in accordance with pupils' different levels of mastery and needs for support in the learning process? What are the recourses, barriers and dilemmas in schools' development towards achieving inclusion?

Theoretical framework

The project's joint perspective is based on selected theoretical traditions related to content and methodology. Certain common denominators for the study are outlined in the following section.

Study of interaction between regular and special needs education in the development of inclusive practices in school: The project advocates the need for cooperation between regular and special needs education, innovation, and research as well as direct cooperation between the two professions within the regular school and related support services (Frederickson & Cline, 2002; Johnsen, 2001; Naša Škola, 2005; Nilsen, 2002). The principle of inclusion represents a major shift in approaches to teaching, from traditional whole class teaching to celebration of the diversity of pupils' learning resources within the community of the class (Befring, 2001; Booth & Ainscow, 1998; Booth et al, 2000; Eggertsdottir & Marinossion, 2005; Ferguson, 1996; Johnsen, 2001a; 2007). The new approach implies that the usual organisation with one teacher in the classroom is expanded with additional flexible organisational solutions such as co-teaching and educational support teams within the school. The presence of special needs educators as members of the regular school staff is an important factor. Moreover it implies that teachers' attention turns towards the mastery

and abilities of each pupil, and in turn towards the class as an arena for pupils' joint cooperation in the learning process under their professional supervision (Johnsen, 2001; 2007; Naša Škola, 2005).

“Cultural-historical” approach to learning in context: The project adopts a socio-cultural or cultural-historical approach to the study of teaching and learning. The founder of the cultural-historical tradition, Vygotsky (1978), argues that knowing the pupil's level of mastery is necessary but not sufficient. Rather, the educator also needs to discover the pupils' level of potential development, which is found through assessing their problem-solving capabilities under their guidance or in cooperation with more competent peers. Vygotsky states that learning is a social activity based on interaction between learner and environment, that the main mediating tool for learning is communication, and that the optimal quality of learning is determined by the learner's cultural-historical environment. His concept of *the proximal zone of development* is a core concept of this study. Related concepts developed by Vygotsky and post-Vygotskian scholars, such as *mediation* (Rye, 2001; Wertsch, 1991), *apprenticeship* (Rogoff, 1990; 2003) and *scaffolding* (Berk & Winsler, 1995; Rogoff, 1990; Sehic, Karlsdóttir & Guðmundsdóttir, 2005) are discussed and applied in relation to teaching and learning activities.

Inclusive practices from a didactic-curricular perspective: A set of didactic-curricular concepts (Englund, 1998; Johnsen, 1998/2000) will be used in the classroom studies as thematic sub-questions, directing focus towards main categories of classroom activities. Five topics or aspects; pupil/s, assessment, educational intentions, educational content, methods and classroom organisation, are classical categories with roots back to Plato and ancient Greek tradition. They are also commonplace categories embedded in a shared European educational heritage (Johnsen, 1998/2000). Two new topics, communication and care, have been awarded the same status as the classical concepts in an effort to investigate their role in planning and implementing teaching in accordance with the variety of all pupils' individual and special education needs (Befring, 1997; Johnsen, 2001; Noddings, 1992; 2003). All topics will be analysed in mutual relation to each other and will thus serve as a framework for descriptions, discussions and comparisons of studied classroom activities. The seven topics are related to an eighth main topic, namely frame factors, which directs the attention to the relationship between individual and class curricula on both local and national level: national policy and curriculum, economic and physical factors and a number of different cultural as well as historical aspects that are all elements

creating opportunities and barriers for teaching and learning in the class setting. This eighth topic was introduced to the field by scholars of educational ecology, such as Bronfenbrenner (1979) and Goodlad (1979). In their mutual relationship the eight aspects form a model, which is a modification and further extension of Bjørndal and Lieberg's (1978) *Didactic Relation Model*, a well-known model presented in several versions and studied by Norwegian teachers, special needs educators, educational administrators and researchers as well as participants in the earlier mentioned SØE 06/02 project (Johnsen, 2001; 2007). In current project the eight main topics in the modified and extended didactic-curriculum relation model are applied as joint focal points and as an umbrella or framework for classroom studies, analyses and comparisons (see illustration below).

Classroom studies: This classroom research project focuses on inclusive teaching practices and classroom management through studying educational activities related to the eight didactic-curricular topics or aspects described above. Thus, as an example, the topic 'frame factors' serves to place findings from the educational micro level of a selected class, within the socio-cultural context of the relevant participating country. Thus this study goes beyond former traditions within inclusion studies in which focus has tended to be on either policies or isolated classroom studies as briefly described below.

Figure 1

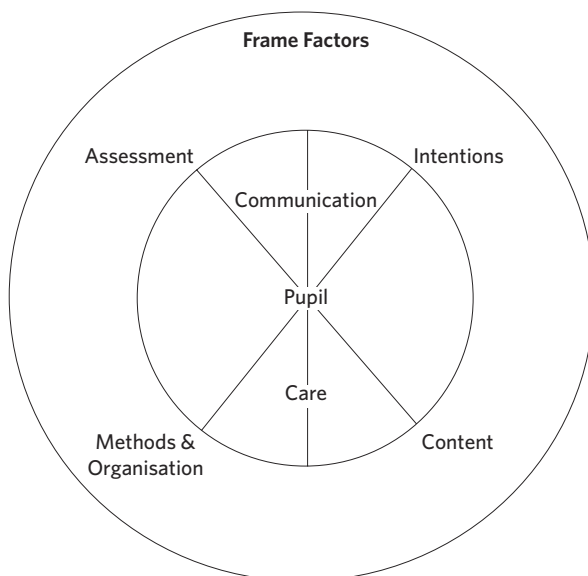


Illustration: The Curriculum Relation Model revised 2006 (Johnsen, 2007).

A considerable amount of the existing literature describes inclusion policies in various countries. These descriptions are surprisingly positive when we keep in mind that large numbers of the world's school-age population do not have access to school, and that children with disabilities tend to be placed at the back of the line whenever there is a lack of official services. On the other hand, there are a number of reports indicating that interesting innovation projects are taking place on the micro level. Fortunately, UNESCO has gathered and distributed a number of these reports for global use (<http://portal.unesco.org/education/en/ev.php>). Additionally, international journals such as *European Journal of Special Needs Education* and *International Journal of Inclusive Education* have inclusion on their agenda. Prescriptions of inclusive practices from schools and classrooms around the world provide inspiration for others contemplating innovation. However, when such descriptions are taken out of their socio-cultural context, they are subject to the problem of 'educational borrowing', a term which will be discussed in more detail below. Pijl, Meijer and Hegarty (1994; 1997) question the usefulness of several reports currently available. Moreover, they recommend that further studies follow theoretical interests and contribute with knowledge regarding the effects of different policies and cultures on inclusive settings, which is the overall purpose of this project.

Methodological approach

Case study design is the main approach utilised in this research project. Case studies have a strong tradition within classroom studies, and qualitative research methodology in general is recommended in special needs education (Ferguson, Ferguson and Taylor, 1992). Kirsti Klette (2003) has led a selection of studies of relevance for this study, focusing on classroom practices. In her study five researchers have gathered information and analysed it from five different regular and special needs educational perspectives. Hjulstad, Kristoffersen and Simonsen (2002) present a case study where communication between kindergarten children who are sign language users, hearing children and staff is analysed via a number of categories of analysis for different aspects of communication. At the Norwegian University of Science and Technology (NTNU) a research group within educational sciences is developing classroom study methodology based on case studies in the Vygotskyan tradition (Moen, Nilssen & Postholm, 2005; Sehic, Karlsdóttir & Guðmundsdóttir, 2005). This joint classroom research project primarily focuses on good examples, more specifically on investigating

schools' available resources for and ability to develop inclusive practices and on analysing them in relation to the barriers and dilemmas encountered in their socio-cultural settings. Participating universities in this project will develop a series of case studies in purposefully selected schools. Within the above-mentioned framework each university will choose further operationalization of research topics, methods, instruments and informants as well as relevant documents involved.

Comparative classroom studies: As an internationally anchored project one of its theoretical pillars is the field of comparative or international studies. An implicit purpose of this study is therefore to be "...that of reform, learning from other situations with the express intention of borrowing ideas that might enable reform in one's own country context" (Watson, 2001:11). Phillips (1999) offers a number of purposes with comparative educational studies relevant to this project:

- To provide a body of descriptive and explanatory data demonstrating various practices and procedures in a broad context that helps shed light upon them
- To show what is possible by examining alternatives to provision "at home"
- To help foster co-operation and mutual understanding among nations by discussing cultural differences and similarities and offering explanations for them.

Watson (2001) points out that perhaps the greatest challenge in comparative studies is the use of decontextualized data gathered from many countries for policy-making decisions. Problems discussed in comparative and international studies of specific relevance for this study are related to the previously mentioned term *educational borrowing*, comparative classroom research and the problem of making cross-national comparisons. These are all problems highlighting socio-cultural contexts from different angles (Alexander, 2000; Osborne et al, 2003; Phillips & Ochs, 2004; Steiner-Khamsi, 2004).

Comparative and international education methodology has been subjected to criticism and revisions since it started out as more or less "travelling tales" (Crossley & Watson, 2003). Later, it developed as a "cause – effect" discipline inspired by natural science (in line with other mainstream educational research), subsequently moving towards anthropology (Schriewer, 1999; Seeberg, 2003), confronting Euro-centrism, even "Western European- and North American-centrism", in addition to identifying and discussing serious challenges such as those mentioned above. Patricia Broadfoot catches a common understanding

of the purpose of contemporary and future comparative educational studies in the following argument:

I suggest that the goal of comparative education is to build on systematic studies of common educational issues, needs or practices as these are realised in diverse cultural settings in order to enhance awareness of possibilities, clarify contextual constraints and contribute to the development of a comprehensive socio-cultural perspective (Broadfoot, 1999:26)

The comparative analysis in this project has two perspectives, one with focus on “regional- internal” comparative analysis between countries in the West-Balkan region with their near history of the same educational policy and governance, and a second comparative analysis between two European regions with different social welfare society models, the North-West and South-East outskirts of Europe. This makes the project an interesting methodological example in light of overview studies showing that only a minority of comparative studies (around 30 %) relates to more than one country, of those reported in international journals such as *Comparative Education Review* and *Comparative Education* (Broadfoot, 1999; Halls, 1990; Rust et al., 1999).

Alexander (1999) describes the development of cross-cultural comparisons during the 1990s as two parallel traditions, one largely characterised by quantitative pre-test/post-test sampled studies and the other by more intensive qualitative-ethnographic investigations. Classroom studies belong to the latter of these traditions. School effectiveness studies have gained increasing attention in recent years, as debate related to the so-called PISA project demonstrates (<http://www.pisa.no/>). We have chosen the concept ‘quality study’ instead of ‘effectiveness study’ for our project. Case study is a well-established methodological design within comparative studies as described in the prestigious *International Encyclopedia of the Social & Behavioral Sciences* (Berg-Schlusser, 2001). Charles Ragin (1987: 16), an outstanding scholar within the analysis of comparative methodology, argues that “the comparative method is essentially a case-oriented strategy of comparative research”. Studies of cases from other countries may allow implicit comparisons, which in turn may lead to critical reflection on policies and practices utilised in ones own country (Buk-Berge 2005), which, as mentioned above, is this project’s implicit purpose. Alexander (1999; 2000) has conducted a major cross-cultural comparative study of primary education in five countries on three continents. His search for and choice of main categories for studying, analysing and comparing teaching practices serves as inspiration for this project.

Joint research problem or issue and sub-topics: In accordance with Stake's (1995) chosen terminology in case study methodology, we use the concepts 'issue' instead of research problem or question, and 'topic' instead of sub-questions (Creswell, 1998; Stake, 1995). As previously mentioned, the main issue of this joint research project, stated as a question, is the following: How does the school teach in accordance with their pupils' different levels of mastery and needs for support in their learning process (recourses, barriers and dilemmas)? Focus is directed towards the teacher's (in this text the term "teacher" is used for both the individual classroom teacher and – if available – co-teachers, special needs educators and assistants in the class and the school's internal resource team) activities in the interaction between teacher and pupil, also called the *master-apprenticeship relation* (Lave & Wenger, 1991: 94). The eight main topics or aspects discussed above have been selected as joint topics for information gathering in order to describe, analyse and discuss the issue. They are:

The Pupil(s) – Assessment – Educational Intentions – Educational Content – Class Organisation and Teaching Methods – Communication – Care – Frame Factors

As stated above, the issue together with the topics construct a joint framework for comparative analysis and discussions of the participating classroom studies. Within this framework there is flexibility concerning choices the research groups have to make in the process of operationalizing and delimiting their concrete study, such as:

- number of pupils participating in the study
- type of special need/disability/vulnerability
- which of the eight topics to study in depth and which to remain in the background

Design, methods, instruments and analysis: As discussed above, case study design – preferably with either a qualitative or combination of a qualitative and quantitative approach, also called mixed methods – is recommended. Data collection methods consisting of a combination of interviews of purposefully selected key informants and/or focus groups, observations, material gathering related to the eight topics, other document analysis and systematic use of field notes, are expected to create a basis for triangulation of information (Creswell, 1998; Gall, Gall & Borg, 2003; Kvale, 1996; Stake, 1995; Silverman, 2000). The words 'recommended' and 'expected' are used here to signalise that each researcher and participating university is expected to select relevant design,

methods, instruments and type of analysis for their operationalized research questions within the joint framework. Considerable time has been allocated to the participating universities in order to develop concrete research plans and exchange information concerning their choice of methods and instruments.

Ethical considerations

A series of ethical considerations and dilemmas are related to both research in general, and classroom research involving possible vulnerable individuals and groups. Relevant procedures will be discussed related to obtaining voluntary access, informed consent and participants' rights to inspection as well as procedures to ensure the privacy and confidentiality of research data (Befring, 2004; Gall, Gall & Borg; 2003; Silverman, 2000). There is a specific ethical dilemma in relation to the problem of identifying special educational needs and labelling pupils in accordance with their difficulties and disabilities (Reindal, 1998). This dilemma applies to choice of terminology and focus as concerns levels of either difficulty or mastery, as well as the choice of analytical categories. These are two of the main problems and dilemmas within special needs education and inclusion discourse, and they will be continuously considered during the research process, most specifically in relation to the reporting of findings.

Research process

This is a joint comparative study with participants from seven different universities in six countries. The plan is that each university will participate with one coordinator, preferably a senior researcher at the doctoral or professor level, and a junior researcher, preferably a doctoral candidate or newly appointed PhD. whose English skills in both an academic and administrative sense are highly developed.

Collaboration will be based on a combination of national studies and joint workshops held each semester and rotating among the participating universities. Each workshop will consist of a joint follow-up of the national studies through presentations and discussions of papers and a seminar hosting internationally outstanding scholars whose work relates to key aspects of the research process. In addition, the hosting university invites on excursion to their selected research school and meetings with key representatives within policy-making,

governance and practicing cooperation between regular and special needs education towards inclusion.

Research process and findings viewed as results: The project aims at continuing and extending the West Balkan – Norwegian/Nordic network towards inclusion through implementing research cooperation and conducting joint workshops. The process will be followed by the production of articles describing and discussing project plans, methodology and findings in peer-reviewed anthologies published in English as well as national reports published in the respective countries' native languages.

Schedule for research activity and goal attainment

2006

Project start-up meetings in each participating university between project coordinator and financial coordinator from UiO and project interpreter: Clarifying budget handling and reporting, administration, communication and project activities

Workshop no 1: Planning the comparative classroom studies

The workshops will ambulate among the project universities, each focusing on the joint research project through 1) seminar with guest lecturer 2) workshop with presentations of research process and discussions 3) excursion to project school 4) coordinator meeting

Workshop no 2: Moving From planning to implementation

2007

Workshop no 3: Focus on methods and instruments in classroom studies

Workshop no 4: Studying the complexity of classroom activities: Didactical – curricular considerations

2008

Workshop no 5: Discussing socio-cultural approach to inclusive classroom practices

Workshop no 6: Considerations in comparative classroom studies

2009

Workshop no 7: Considerations regarding writing comparative research reports

Workshop no 8: Workshop or conference presenting papers from the joint comparative classroom study towards inclusion

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