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## **Inclusive Education and Training Systems: Illusion or Reality? The Story of Nothemba**

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### **Abstract**

This article explores the challenges facing the South African National Department of Education in its commitment to provide equal educational opportunities for all. *The Story of Nothemba* is central to the theme of this paper. It describes the story of a South African girl born in eQebe, whose physical disability and systematic disregard for her constitutional rights dashed her life time dream and passion to become a lawyer in a democratic South Africa. The paper argues for a critical interrogation of the following dynamics that have the potential to complicate both the implementation and optimization of the Inclusive Education Policy: (i) Understanding the social stereotypes about disability, (ii) Teacher empowerment, (iii) Systemic imbalance between support and expectations, (iv) Adopting relevant curriculum policy and assessment strategies and practices, and (v) Utilizing the research logic to inform policy implementation. The paper further calls for a robust interrogation at conceptual level about 'disability' to inform the current policies on education and training, teacher training and development, curriculum and assessment strategies.

## **1. Introduction**

Story telling is an integral part of African culture and heritage. It is through this genre that both national and personal historiographies are passed from one generation to the next. The importance of story telling as a craft has been succinctly articulated by Fredrickson (1997:12) who writes “We all have stories to tell. In times past, people seemed to understand that stories are the way we make sense of our lives, pass long knowledge and traditions that are helpful, and transform knowledges and traditions that no longer serve us”. What Fredrickson postulates is both instructional and relevant to the theme of this paper in many ways. In the first incidence, it is a story about a South African girl born in eQebe, whose physical disability and the ravages of the then apartheid regime dashed her life time dream and passion to become a lawyer in a democratic South Africa. In the second, it offers us an opportunity to interrogate the challenges associated with the institutionalization of Inclusive Education and Training System (IETS) in a post apartheid South Africa.

### **1.1 The Story of Nothemba: A struggle for identity, recognition and acceptance**

I am tempted to begin this paper by narrating a story about Nothemba, who as a consequence of her physical disability and the ravages of the then apartheid legacy lost her identity and constitutional rights as a South African. She also lost her recognition and acceptance as a human being and a bona fide member of the Qebe community. She became an outcast in her own family, community and country of birth and lived a secluded life. Nothemba was born 75 years ago in a rural and poverty stricken village of eQebe in the Eastern Cape, South Africa. The news of Nothemba’s impending birth created a lot of euphoria and excitement among the Njabulo family and the community at large. For the Njabulo family, it would signify an important development in their life. They were expecting their first born child that would continue the Njabulo lineage. It was during this period of pregnancy that the Njabulos seriously pondered about the future of their unborn child. They had visions of how the birth of their first born child would literally and symbolically change their lives. Their social stature would substantially change. They visualized Nothemba’s educational successes as a plausible strategic framework on which to build the civic virtues of the Qebe community and the nation at large. The thought of being the parents to a successful child-turned lawyer was ecstatic and conjured endless waves of gratitude, celebration and hope. They could not wait for the child to be born. It seemed like eternity.

The defining moment finally happened, Nothemba was born. The news about Nothemba’s birth spread like a bush fire across the Qebe village. It was an antithesis of their nine months of waiting, hope and illusions. Their hopes and aspirations had gone to the dogs! Nature had dispatched one of its cruel blows to the Njabulo family. They had given birth to a child with disability. Nothemba was born blind. Within the Qebe community, blindness was associated with mythology and witchcraft, a serious abomination within the Qebe village in general. As a consequence of the societal stereotypes about disability and to protect themselves from public harassment and prejudice, Nothemba was banished away from her family, community and cultural heritage. She lived a secluded and lonely life away with her grand-mother. Her wish and passion to become a lawyer quashed away. Her constitutional rights deliberately

undermined and compromised. The story of Nothemba Njabulo is but one of the many untold personal struggles and tragedies that many South Africans with disabilities have endured over the years and have come to embrace as part of their identity and a definitive summation of their biographies

## **2. Inclusive Education and Training System: Unmasking the Context**

The Constitution of South Africa (Act 108 of 1996) stipulates unambiguously in (Section 29(1) that everyone has the right to (i) a basic education, including adult basic education, and (ii) further education, which the state, through reasonable measures, must make progressively available and accessible. The notion of the right to basic education is further articulated in Sections 9(2), (3), (4) and (5) which commits the South African government to achieve the principles of equality and non-discrimination across the education and training sector. It is within this purview that the government is further obligated to create plausible conditions for the implementation of a new unified system of education and training.

Of particular relevance in this regard is a litany of educational policies and frameworks that have since 1994 underpinned and shaped educational change and transformation and these include: Education White Paper No1, on Education and Training (1995), National Commission on Special Needs in Education and Training and National Committee on Education Support Services (1996), Higher Education Act (1997), South African Schools Act (1997), Further Education and Training Act (1998), Consultative Paper No1, on Special Education: Building an Inclusive Education and Training System (1999), Adult Basic Education and Training Act (2000), National Policy on Whole School Improvement (2001), Revised National Curriculum Statement Grades R-9 (2001).

South Africa's commitment to champion and develop the culture of rights and freedoms among the South Africans and the world at large, is confirmed by the enactment of laws, policy frameworks and promulgation of Bills by Parliament. Of critical significance to the thesis of this paper are the: Human Rights Commission (1994), Commission on Gender Equality Act (1996), Constitution of South Africa (Act 108 of 1996), National Disability Strategy (1997) and White Paper on Disability (1997) to mention but a few. Of the above mentioned legislative policy frameworks, the Constitution provides a fundamental framework to address human rights issues in post apartheid South Africa. The South African Constitution as the supreme law of the land in its preamble guarantees the following civil virtues: (i) Heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights, (ii) Improve the quality of life of all citizens and free the potential of each person, (iii) Lay the foundation for democratic and open society in which Government is based on the will of the people and every citizen is equally protected by law.

The vision of the South African Constitution alluded to above is central to the thesis of this paper. It in many ways responds to the plight of Nothemba and many South Africans that experienced the wrath of the apartheid regime. In a nutshell, the apartheid system did not guarantee Nothemba's rights as a human being and a bona fide citizen of

South Africa. The advent of the democratic dispensation in South Africa in 1994 has played a significant role in foregrounding the social justice discourse. The notion of social justice throughout the period of political struggle and liberation has played a major role in raising the level of political consciousness among the South Africans. According to Feagin (2001, p. 5):

...Social Justice requires resource equity, fairness and respect for diversity as well as the eradication of existing forms of social oppression. Social Justice entails a redistribution of resources from those who have unjustly gained them to those who justly deserve them. And it also means creating and ensuring the process of truly democratic participatory decision.

The cumulative significance of the policies alluded to above can be summed up as follows: (i) Affirmation by the African National Congress led government about its political will and commitment to provide the necessary resources and infrastructure to transform the social structures, (ii) Strong message to the global world about the need to promote and uphold the culture of Human Rights, (iii) Provide the basic infrastructure for the interrogation of an Inclusive Education & Training System and (iv) Provide fora that would set the change agenda including consolidation of transformation initiatives and successes thus made.

It is in this context that 1996 will remain a symbolic year for the African National Congress led government. It was during this period that the Ministry of Education appointed the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services to investigate and make tangible recommendations on 'special needs and support services' in education and training in South Africa. The rationale was to find strategies to redress the apartheid legacy in education and training. I must hasten to add that during the apartheid era, 'special schools' were for the few and privileged and the majority of blacks with disabilities were denied access to such schools including social welfare, except a few that were run by the missionaries. These schools were few and under-resourced. It is within this context that the Story of Nothemba epitomizes the enormity of the challenge lying ahead particularly with regard to questions of access, equity and redress.

Furthermore, the Commission's investigation yielded the following scenarios that characterized apartheid education and disregard for the rights of those with disability: (i) Specialised education and support have been predominantly provided for a small percentage of learners with disabilities within 'special' schools and classes; (ii) Where provided, specialized education and support were provided on a racial basis, with the best human, physical and material resources reserved for whites; (iii) Most learners with disability have either fallen outside of the system or been 'mainstreamed by default'; (iv) The curriculum and education system as a whole have generally failed to respond to the diverse needs of the learner population, resulting in massive numbers of drop-outs, push-outs, and failures; and (v) While some attention has been given to the schooling phase with regard to 'special needs and support', the other levels or bands of education have been seriously neglected. (Education White Paper 6 2001:5).

The Commission's findings are instructional and relevant to the discourse of change and transformation. In the first instance, they created a forum for dialogue among the stakeholders on the rights of the people with disability. Second, they led to a paradigm shift both in policy and praxis which culminated in the conceptualization of the Education White Paper 6, with well defined short and medium term strategies regarding three fundamental aspects of transformation such as funding, human development and infrastructure. The need and exigency to transform and implement educational changes in a more transparent and holistic manner is well articulated by the Education White Paper 6 stipulates that:

The education and training system should promote education for all and foster the development of inclusive and supportive centres of learning that would enable all learners to participate actively in the education process so that they could develop and extend their potential and participate as equal members of society (Education White Paper 6: 2001, p. 5).

The resonance of what the Education White Paper 6 articulates and proposes as a transformative strategy was non-existent during lifetime of Nothemba. The education system then failed to honour her right to education and better life as a person with disability. To circumvent the challenges and tribulations that Nothemba and South Africans of similar physical stature experienced during the apartheid regime, the Education White Paper 6 (2001:6) makes the following fundamental propositions: (i) Transforming all aspects of the education system, (ii) Developing an integrated system of education, (iii) Infusing 'special needs and support services' throughout the system, (iv) Pursuing the holistic development of centres of learning to ensure a barrier-free physical environment and supportive and inclusive psycho-social learning environment, developing a flexible curriculum to ensure access to all learners, (v) Promoting the rights and responsibilities of parents, educators and learners, (vi) Providing effective development programmes for educators, support personnel, and other relevant human resources, (vii) Fostering holistic and integrated support provision through inter-sectoral collaboration, (viii) Developing a community-based support system which includes a preventative and developmental approach to support, and (ix) Developing funding strategies that ensure redress for historically disadvantaged communities and institutions, sustainability, and –ultimately- access to education for all learners.

In addition to the policies alluded to in the discussion above, there are further policy changes and consolidation achievements taking place. Of particular significance are (i) Report to the Minister: A review of the financing, resourcing and costs of education in public schools (2003), (ii) Implementation Plan for Tirisano (2001-2002), to mention but a few. A lot of work still lies ahead before tangible policy implementations can be realized. The extent to which the envisaged changes are implemented will indeed give credence to both the short and long term benefits. Furthermore, the level of success will invariably confirm South Africa's commitment to transform education and institutionalize Inclusive Education & Training System for the scholastic empowerment of South Africans.

### **What is an Inclusive Education & Training System?**

Commenting on the need to transform educational systems to address socio-political challenges Tomasevski (2003, p. 18) writes:

For education to be adaptable, schools must adjust to children's needs in accordance with the principle of the best interests of every child. This change ended the practice of forcing children to adapt to whatever school was offered to them. Human rights being indivisible, the requirement of adaptability means that all human rights must be protected within the education system and also improved through education.

It is in this context that the Story of Nothemba reverberates again and again about the need for governments worldwide to recognize and affirm the rights of children in their education systems. A commitment the apartheid regime failed to honour in the case of Nothemba.

Education White Paper 6 (2001:16) identifies the following as the critical pillars of an Inclusive Education and Training System: (i) Acknowledging that all children and youth can learn and that all children and youth need support, (ii) Enabling education structures, systems and learning methodologies to meet the needs of all learners, (iii) Acknowledging and respecting differences in learners, whether due to age, gender, ethnicity, language, class, disability, HIV or other infectious diseases, (iv) Broader than formal schooling and acknowledging that learning also occurs in the home and community, and within formal and informal settings and structures, (v) Changing attitudes, behaviour, teaching methods, curricula and environment to meet the needs of all learners, and (vi) Maximizing the participation of all learners in the culture and the curriculum of educational institutions and uncovering and minimizing barriers to learning.

The cumulative significance of what the Education White Paper 6 poses demonstrates the enormity of the challenge, the ANC led government faces as it grapples with transformation and change. The challenges alluded to above are not peculiar to South Africa alone. Several countries and organizations have engaged commissions to figure out plausible strategies of addressing these challenges. According to Tomasevski (2003, p. 13):

Accessibility subsumes various government obligations. Education as a civil and political right requires the Government to permit the establishment of schools and universities, while education as a social and economic right requires Government to ensure that education is ...for all children of school age. Education as a cultural right requires the affirmation of collective and individual rights...

Tomasevski's analysis of educational rights in Colombia's system of education is relevant to the issues raised by this paper. Of particular significance is the ability to capture the complex interplay between education and politics in general. In South Africa education has always been a source of political contestations. The thesis of Tomasevski (2003) bears semblance to the Story of Nothemba and attempts to institutionalise an Inclusive

Education and Training System. Like her Colombian counterparts, Nothemba's rights and freedoms were violated. She was banished away from her family and community. Her right to basic education and training was usurped by the apartheid regime. The advent of the new democracy brings with it opportunities to recognize and affirm human rights and freedoms. Educationally, it presents South Africa with exciting possibilities to institutionalize Inclusive Education and Training System that is adaptable, competitive and responsive to the needs of South Africans.

### **3. Defining Disability**

The concept disability is variously defined and understood, for instance, Power (2001, p. 85) refers to disability as:

...cognitive and physical conditions that deviate from normative ideas of physical ability and physiological function. The term disability and disabled denote more than a medical condition or an essentialised 'deformity' or difference and are preferable to the terms 'impairment' and 'handicapped' which suggest inherent biological limitations and individual abnormalities.

To advance the argument and issues raised here, I intend to adopt Mitchell and Snyder's (1999, p. 3) definition of disability that "denotes the social, historical, political and mythological coordinates that define disabled people as excessive to traditional social circuits of interaction and as the objects of institutionalised discourses". The story of Nothemba is used as an appropriate metaphor to reflect on the plight of people with disabilities. It is also used as a scaffold to interrogate the possibilities for creating conducive conditions to optimize the potential of people with disability. In her analysis about the need to mainstream gender issues Dankelman (2003, p. 17) writes:

Good governance not only includes transparency, democracy and respect for human rights, institutional capacity and resources, but it also has major gender implications. Among these are equal participation of women at all levels, their access to education, training, employment and benefits, as well as the use of gender differentiated methodologies and instruments... Gender mainstreaming is not simply a question of more women in decision making... in... development sector. It also means that institutional mandates, policies and actions are shaped by gender perspectives.

The resonance of Dankelman's articulations is a sad reminder of Nothemba's plight. As a consequence of apartheid laws, she could not benefit from such an educational system since gender mainstreaming was selective and highly racialised. Attempts to mainstream women and gender issues have to be underpinned by sound policies and legislative frameworks. As argued earlier, South Africa is endowed with such plausible policies to advance the rights and aspirations of women and its citizens in general.

The discourse of mainstreaming gender and women issues, particularly regarding those with disabilities remains a global challenge. The enormity of this challenge was further re-affirmed by the Disabled Peoples' International Women's Committee (DPIWC)



during the 1995 Beijing Conference. The DPIWC (2000) took a critical stance towards the United Nations' initiatives on social development, with a particular reference to women. In its rebuttal, the DPIWC expressed serious concerns at the lack of 'significant impact' towards developing and sustaining the profile of people with disabilities in national economies, particularly women and girls in developing nations. Of particular significance here is the dearth of public awareness campaigns around issues of disability and concomitant challenges facing people with disabilities across the globe.

The lack of commitment to transform and improve the socio-economic conditions of the people with disabilities is further expressed by Mandla Mabila, a virtual artist during an interview with Shelley Barry. Mabila argues that it is incumbent upon practising artists with disabilities to conscientise the public around issues of disability. He argues that through arts and culture peoples' perceptions about disability can successfully be conquered and transformed. Commenting on the role of arts and culture as an empowering strategy to transform people's perceptions about disability, Mandla argues:

The role of arts and culture is an important one in South Africa not only for self-expression of experiences of disability but as a way of entrenching our experiences as people with disabilities and saying that we count... There is a disability culture emerging in South Africa right now and it is coming out with images of disability, images of strength, beauty and pride. This culture needs to be nurtured and safeguarded (Barry 2001, p. 2).

To highlight the plight of people with disability, Mabila recalls a story once narrated by one of the delegates during the National Conference on Witchcraft Violence held in September 1998:

It is a story of a woman who gave birth to a disabled baby. The child had one arm. She (mother) was immediately told that she gave birth to a witch. She had to dig a grave, and jump over it while she threw the child into it. The family then burnt the child, and threw the ashes in the grave (Conference Report, 1998, p. 27).

The story alluded to above and Nothemba's are a grim reminder of a chilling and atrocious incidences of discrimination and human rights abuses that continue to dominate the news headlines across the globe.

#### **4. Disability as a Human Rights Issue: Some Reflections**

Disability is both a global and human rights issue that has no racial, gender, socio-economic and political boundaries. People with disability exist throughout the globe (world). As a consequence of rampant and systematic disempowerment through discrimination, people with disabilities are susceptible to poverty, prejudice, public violence and early death. Apart from living in abject poverty, the majority of disabled people are deliberately denied access to education, health and social welfare, employment and the basic right to life and development. The cumulative implication of these practices is indeed a gross violation of human rights principles and virtues. Commenting

on the experiences of disabled people in Zambia, Hamuwele (1993) argues that invariably, disabled persons are made invisible including the violations of their human rights.

Furthermore, Hamuwele argues that the majority of parents in Zambia will only educate children without disability. This is a consequence of a view that perceives children as future security. Families will not invest in the welfare of disabled children. It is seen as an irrational burden. The Zambian perceptions about disability also apply to most indigenous communities in Africa and elsewhere, disability is unfortunately associated with witchcraft or some form of a curse. Similar views on disability and negation have been articulated by Rapp (1998:1):

The attitude that a disabled child is not worth the effort required to advance his/her personal and/or social development leads to emotional abuse and feelings of isolation, low self-esteem, and worthlessness for the disabled child. Sometimes parental neglect is compounded by others in the community who encourage the family to ignore the disabled child. . . . A disabled woman from the USA, Etta Ginsberg-McEwan, recalls that : 'At the outset, my mother was told by the doctor: 'Forget about this little girl. Place her in an institution. You have other children'.

The tendency to 'hide' persons with disability away from the rest of the community is an attestation of a rampant and systematic discrimination and breach of human rights strategy prevalent in our communities. From time in memorial, disabled persons have been viewed as a burden to society and family. As a consequence of this negation, many were brutally killed and continue to be exposed to all forms of abuses. It is increasingly evident therefore, that incidences on disability alluded to above are invariably, human rights issues. Drastic steps and strategies have to be identified and implemented to stop the blatant violations of the fundamental human rights of the disabled people. Rapp (1998:3) offers both a cautionary and pragmatic strategy towards addressing the problem of disability:

The voices of disabled people must be encouraged, listened to and taken seriously. Only then will the brokenness, poverty, sadness and self-hatred give way to the vast array of resources, gifts, skills and visions of disabled people. Only when the abilities of those with disabilities are acknowledged and incorporated into our churches, schools, and home will our community be whole.

The notion of disability and the concomitant experiences that individuals bear across communities are both complex and challenging. The level of negation that is associated with disability complicates the overall socio-economic framework of the disabled people. According to Disability Studies the public negation experienced by people with disability is a consequence of discriminatory laws and practices based on fallacy and stereotypes (Funk, 1987; Olkin 1999; Stone, 1999; Gleeson, 2001 & 1999). Similar views have also been articulated by Power (2001) who argues that a failure to embrace disability as a nation challenge has serious ramifications on the overall societal infrastructures. Power (2001. pp. 94-5) further offers an invaluable perspective regarding the concept of disability:

The construction of disability as a separate development policy domain is problematic...to develop enabling alternatives development agencies need to radically rethink their entire notion of development taking their lead directly from the disability movements who endure its contradictions and shortcomings on a daily basis. Disability issues cannot be hidden away in a private house or policy document and must not be allowed to appear as obscure sub-site of key institutional web sites like that of the World Bank. Perhaps the very success or failure of every form of 'development' should be measured by the extent to which it is inclusive of disability.

### **5. Teacher Empowerment: A prerequisite for an Inclusive Education and Training System**

The academic credence of institutions of learning is invariably gauged by the professional profile and organisational ethos of both the academic and support staff. Undoubtedly, professional development is critical towards the overall enhancement of institutional profile and practices. It serves both as a benchmark for educators (academics) to gauge their professionalism and the degree of preparedness to meet the new educational challenges. The government's decision to implement inclusive education and training has a range of challenges to facilitate smooth implementation. In the first instance, it requires teachers (educators) endowed with specialised training, skills and competences to adequately address the learning needs of learners with disabilities. The reality of the situation is that South Africa has a dearth of educators with specialised training. Poorly trained and under-qualified educators compromise not only the educational ethos but the overall organisation and application of inclusive education and training system in our institutions of learning.

Another challenge closely associated with professional development is the lack of professional resourcefulness among those entrusted to educate our children. This is evidenced by their religious reliance on textbooks. As a consequence of this deficiency, educators struggle to create conducive environment for the learners with disabilities to explore the frontiers of knowledge. Inability to use appropriate resources, teaching and assessment strategies has serious implications for the intellectual development of learners with disabilities. Another concern related to the one alluded to above, is the educators' lack of basic classroom management and facilitation skills that would enable them to monitor learners' progress and intervene where appropriate. To address this problem, appropriate educator empowerment programme should be explored and implemented to give impetus to the notion of school effectiveness, especially within the context of inclusive education and training.

Attempts to empower teachers (educators) should be underpinned by a rigorous audit of the following key professional development indicators: (i)Qualifications, (ii)Professional and work ethos, (iii)Knowledge capacity with regard to learners with disabilities, (iv)Methods and strategies of teaching, (v)Assessment and evaluation strategies, (vi)Leadership and management skills, (vii)Organisational and operational skills, and (viii)Linguistic proficiency. These are the basic benchmarks that teachers should display in their interaction with learners of diverse social, economic and educational background.

It seems appropriate therefore that for the policy of inclusive education and training to succeed it must be anchored on a well capacitated professional development unit that understands the dynamics of inclusive education agenda. To optimise their value, teachers should form the core of an intervention team and be at the cutting edge of their discipline. This obviously hinges on the nature and quality of teacher education programmes available to teachers.

During the apartheid era, teacher education and training in this country was highly fragmented with great disparity in the quality of training offered by different institutions. The conditions did not accelerate optimal functioning of teachers and learners. The emerging Higher Education Plan attempts to redress the apartheid legacy by addressing both the structural and curricula issues. Tangible changes have indeed unfolded since 1994, for instance, the National Department of Education (NDoE) appointed a Committee on Teacher Education Policy (COTEP, 1999) to develop a set of norms and standards for teacher education and training. The COTEP document outlines in details the various roles teachers (educators) have to perform to facilitate effective teaching and learning. These include educators being: (i) Learning mediator(s), (ii) Interpreter and designer of learning programmes and materials, (iii) Leader, administrator and manager, community, citizenship and pastoral role, (iv) Scholar, researcher and lifelong learner, (v) Learning area / subject/ discipline/phase specialist and (vi) Assessor of the learning process.

Each role requires educators to display foundational, practical and reflexive skills and competences in their interactions with learners. This reflects a paradigm shift from the former content based approach to teacher education and training and towards a process-oriented, competence based approach. It is within the context of these changes that the following questions continue to prickle the minds of the stakeholders in education and training: (i) What does the new policy on teacher regulation and development say teachers should be doing in the classroom? (ii) What are teachers actually doing in the classroom? (iii) Is there a "fit" between what policy stipulates (expects) and what actually takes place in our school classrooms? Answers to these questions highlight the magnitude of the processes of school improvement. It is clear that more effort has to be directed at changing the conditions of our schools. They ought to be run professionally by well qualified educational leaders who have a solid knowledge and understanding of the historiography of South Africa and its impact on educational initiatives. It is not a simple feat it is like performing a Russian Troupe on a minefield. It requires utmost discernment and impeccable mine-craft to successfully de-activate the mines before one is blown into shreds. Furthermore, it must be underpinned by the principles of diversity, collegiality, collaboration, creativity and etiquette. It becomes even more daunting when it applies to inclusive education and training. A lot of foreground has to be done to harmonize the context within which educational change has to occur.

The success of the policies referred to above will depend on many factors. The key is the adequate monitoring strategies to reinforce their implementation. On the contrary, lack of well articulated implementation and monitoring framework

poses a serious challenge. The enormity of the situation will further be compounded by the National Department of Education's commitment to implement inclusive education and training. To professionalise institutions of learning depends largely on the leadership and collegial undertaking by the stakeholders to initiate the most compelling strategic changes that would catapult the profile, identity and the core business of such institutions. Teachers form a crucial part of any transformation initiative. For teachers (educators) to play a significant role in educational transformation, they need to understand the institutional processes and continuously remain at the cutting of their discipline of specialisation. Unfortunately, we cannot micro-wave teachers into professionals of a meticulous teaching and research stature. It is a process that requires commitment, time, resources, training and a passion to conquer the ever cascading educational landscape and teaching challenges.

Similar views have been expressed by Carlson (1989, p. 2) .who believes that:

By giving more authority to and imposing more responsibility upon teachers and principals, school based management contributes to an overall professionalization of the work force...effective schools have staff that share a commitment to excellence and that help one another in moving the school in that direction.

The resonance of Carlson's argument is also reflected in the litany of research on school effectiveness and improvement (Harris 2000). This would afford institutions of learning to become self-directing. The notion of self-directing should be complemented by these following operational changes and practices: (i)Institutional commitment to quality education, (ii)Inter-institutional collaboration to exchange information and expertise, and (iii)Peer coaching and mentoring the basic strategies that schools can use to accelerate teacher effectiveness and optimal learner performance.

Congruent with the above suggested strategies is the need to strengthen and consolidate the parent community and school partnership. Such a tripartite partnership should focus inter alia. on "increasing the active (as opposed to superficial) involvement of parents in the education of their children...moving beyond parents to raise the level of involvement and commitment of other community members as well". This is both relevant and instructive in that it underlines the need to formalise collegial partnership between schools and communities. Such a venture would harmonise the social fabric between schools and members of the community. It would further empower them about the dynamics of schooling. This is crucial for South Africa bearing in mind that during the apartheid era, communities had no say in the way schools operated. Educational decision making was the exclusive prerogative of the government through its bureaucratic structures.

## **6. Systemic Imbalance between Support and Expectations towards Implementing an Inclusive Education and Training System**

Whilst there is unanimity regarding the relevance of the framework on which inclusive education and training system is anchored, there seems to be serious systemic imbalances between the framework, the support and national expectations. Educational policies and frameworks are not cast in stone. They are a resultant of dialogue and robust contestations between various stakeholders. Similarly believing and supporting inclusive education initiative does not guarantee that the system will function effectively. There are other organic variables that need to be assessed to minimise failure. For instance, an audit of available resources and capacities within the system is crucial. Another key component associated with the systems and resources' audit is the need to have mechanisms in place to prioritise strategies and action plans. The enormity of this challenge is succinctly articulated by the Education White Paper 6 (2001, p. 17):

The Ministry accepts that a broad range of learning needs exists among the learner population at any point in time, and that, where these are not met, learners may fail to learn effectively or be excluded from the learning system. In this regard, different learning needs arise from a range of factors, including physical, mental, sensory, neurological and developmental impairments, psycho-social disturbances, differences in intellectual ability, particular life experiences or socio-economic deprivation.

The Education White Paper 6 (2001:18) further identifies the following as potential barriers to inclusive education and training: (i) Negative attitudes to and stereotypes of differences, (ii) An inflexible curriculum, (iii) Inappropriate languages of learning and teaching, (iv) Inappropriate communication, (v) Inaccessible and unsafe built environments, (vi) Inappropriate and inadequate support services, (vii) Inadequate policies and legislation, (viii) The non recognition and non-involvement of parents, and (ix) Inadequately and inappropriately trained education managers and educators.

Human resources remain a fundamental component of the systems strategy. Similarly, for the inclusive education and training system to be fully operational, the personnel tasked to operationalise the system should possess appropriate skills and competences for the system to function effectively and efficiently. Furthermore, there must be adequate infrastructure to accommodate the wave of national expectations generated by the envisaged implementation of the new initiative. In its analysis of whether the structural frameworks do impact on institutional operations, UNESCO offers both a provocative and instructive perspective, namely:

Whether or not expanded educational opportunities will translate into meaningful development for individual or for society depends ultimately on whether people actually learn as a result of those opportunities, in other words, whether they incorporate useful knowledge, reasoning ability, skills and values.

Similar concerns also apply to the envisaged implementation of inclusive education and training system in South Africa. Evidence gleaned from literature about inclusive education and training systems is critical about the state of institutional structural framework and resources. At the heart of this cautionary statement is the need to have systems in place to enhance the monitoring of the processes. Although the national framework and policy on inclusive education and training is well articulated, the institutional structural capacity is seriously inadequate. The physical conditions of the majority of schools compromise the fundamental principles of inclusive education and training systems. Poor institutional infrastructure and limited classroom space make it difficult to implement inclusive education. Apart from inadequate physical facilities, the majority of schools in South Africa are poorly equipped and under-resourced. Poorly equipped and under-resourced institutions do not have the capacity to embrace inclusive education initiative as a strategy to change and transform education and classroom practices. Lack of financial support (budget) to invest in institutional resource capacity building impedes the successful implementation of inclusive education strategy. An attempt has to be made to encourage joint and cost effective financial ventures between schools and the private sector to generate funds for instructional resources.

According to Education White Paper 6 the current profile and distribution of special schools and learner enrolment is extremely skewed. In the first instance, there is a serious disparity in terms of the existing establishments for learners with disabilities; learner enrolment and learner expenditure across provinces. (see Appendix). The mismatch learning needs and infra-structural provisions is a consequence of apartheid policies that allocated resources on racial segregation. A comparative analysis of incidences of disabilities and the number of learners accommodated in a school reveals extreme disparities, for instance: (i) 0.28 of learners in the Eastern Cape re enrolled in special schools, yet the overall incidence figure for the population of disabled persons (of all ages) is 17.39%, (ii) This pattern is repeated across provinces, indicating that significant numbers of learners who-based on the traditional model-should be receiving educational support in special schools are not getting any, (iii) While the national total incidence figure for disabilities (of all ages) is 6.55%, the total number of learners in special schools is 0.52%, (iv) Learner expenditure on learners with disabilities varies significantly across provinces, ranging from R11,049 in Gauteng to R 28,635 in the Western Cape and R22,627 in the Free State, (v) Distribution of learner expenditure demonstrates lack of efficiency in the resource use and management, and (vi) It demonstrates lack of uniform resourcing strategy and national provisioning norms for learners with disabilities. (WP6., p.15).

For the policy of inclusive education and training to succeed, a more defined allocation strategy for resources for learners with disabilities needs to be in place to ensure that there is equitable distribution of resources for diverse learners' requirements. This will ensure that learners who require more intensive and specialised forms of support will be adequately provided for so that they can achieve their full potential. Furthermore, funding plays a critical role in the provisioning and serving of an effective education system. The financial constraints as alluded to above cannot and will never be matched by any state budget. Poor facilities adversely contribute to low standards in education which culminate in high learner drop-outs and failure. When teachers and learners find themselves in under-resourced environment, they easily lose confidence in the system

and schools become dysfunction at the cost of the nation. The envisaged implementation of inclusive education and training is likely to compound the situation. Schools need the financial resources to rehabilitate their infrastructure including teaching and learning materials. Access to redress funding and other cost-effective ventures by stakeholders will indeed leverage the necessary financial muscle schools need so desperately.

### **7. Adopting relevant curriculum policy and assessment strategies and practices**

The South African Constitution, 1996 (Act No 108 of 1996) provides the fundamental framework for curriculum reconfiguration and development in the post apartheid South Africa. The Constitution's mandate as outlines in the preamble is to: (i) Heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights, (ii) Improve the quality of life of all citizens and free the potential of each person, (iii) Lay the foundation for a democratic and open society in which Government is based on the will of the people and every citizen is equally protected by law and (iv) Build a united and democratic South Africa able to take its rightful place as a sovereign state in the family of nations.

The Constitution places a huge premium on the Bill of Rights of the citizens in a democratic South Africa. Through the Revised National Curriculum Statement Grades R-9 (2001), (RNCSG) the National Department of Education (NDoE) has embraced the values and principles of the Constitution. In its description of the kind of learners it hopes to produce as part of its curriculum reconfiguration, the NDoE states that:

The curriculum aims to develop the full potential of each learner as a citizen of democratic South Africa. It seeks to create a lifelong learner who is confident and independent, literate, numerate and multi-skilled, compassionate, with a respect for the environment and the ability to participate in society as a critical and active citizen. (RNCSG:8).

The RNCSG adopts an inclusive strategy by specifying the minimum criteria for learners. Such criteria cater for the needs of all learners of South Africa, including those with learning disabilities. The demise of the apartheid regime in 1994 created a wave of euphoria and excitement about the future educational prospects for South Africa. The three cardinal principles that underpinned the transformation discourse in education are *Access, Equity and Quality*. Striving towards realising these principles, the educational initiatives in South Africa have been targeted towards implementing quality education for all. There are concrete developments around the plight of the learners with disabilities within the mainstream and the so called 'special schools'. (EWP1:1995). The legislative framework for instance, Section 8(1) of the National Education Policy Act of 1996 empowers the Minister of Education to 'direct standards of education provision, delivery and performance throughout the Republic'. The seriousness of the plight of learners with disabilities led to the establishment of various fora that engaged at ways of addressing the needs of learners with disabilities. The National Commission on Special Needs in Education and Training and a National Committee on Education Support Services (1996) played a sterling role which led to the formulation of Consultative Paper 1 on Special Education: Building an Inclusive Education and Training System (1999). The



impact of these interactions gave rise to various curriculum policy initiatives that further broadened the scope of debates and discourse.

I must hasten to argue that curriculum policies are not cast in stone. They are a consequence of robust contestations by different stakeholders in education and training. The ensuing debate or discourse around curriculum change and transformation is a consequence of diverse factors, for instance, the huge public displeasure about poor learner performance across the curriculum including discrimination against those with disabilities. It is also due to the huge financial expenses incurred by governments worldwide as a result of dysfunctional school systems. According to Archer (1992) the global proliferation of curriculum initiatives is a response to globalisation and its concomitant impact on institutional domains like science and technology, politics, economics and culture. Archer (1992) and Finegold et al (1993) view globalisation as 'a multi-faceted process' characterised by the principle of interconnectedness and flexible policy borrowing across countries. The adoption of educational policies and systems is a complex process that requires planning and access to resources to make systems functional. Educational systems are not cast in stone. *They are a consequence of contestations and trade-offs between various role-players.* South Africa is a typical example regarding the genesis of educational transformation and the overall political trade-offs.

Curriculum reconfiguration is both a complex and emotive process that requires meticulous planning and monitoring to ensure that the envisaged changes bear fruit. The dynamics of the envisaged educational changes are further articulated by Harris (2000, p. 1) that:

In most western countries the pressure for change has manifested itself through government policies aimed at generating the impetus for school development. In reality, however, such policies have often proved counter-productive to innovation and change. The current dichotomy facing schools is one of greater central accountability and control, with an increased responsibility for self-management and development.

What Harris alludes to is pertinent to the changing educational landscape in South Africa. The adoption of the National Qualifications Framework (NQF) as a grandeur for scaffolding curriculum reconfiguration for South Africa is a bold shift policy and praxis. The NQF is largely underpinned by the following key principles: (i) Create an integrated national framework for learning achievements, (ii) Facilitate access to and mobility and progress within education and training, (iii) Enhance the quality of education and training, (iv) Accelerate the redress of unfair discrimination in education, training and employment opportunities, thereby (v) Contribute to the full and personal development of each learner and the social and economic development of the nation at large. (Government Gazzette, 1995:1).

The principles that underpin the philosophy of the government through the NQF articulations are crucial towards addressing the welfare of particularly, learners with disabilities. Similar views have been articulated by Christie (1997:111) in her analysis of the impact of the White Paper on Education and Training (WPET, 1995):

In responding to the need for change, the WPET brings together a set of proposals to restructure the relationship between education and training, to introduce greater flexibility of structures, to enhance mobility between learning contexts, and to build quality on 'the scaffolding' of a National Qualification Framework. Together, these proposals aim at a policy of 'life-long learning', which would widen access to education and training as well as link it to human resource development policies.

The cumulative wisdom alluded to above, is succinctly elaborated by Nkomo (1998, p. 137):

Education is a process by which we seek to achieve the maximum enlightenment possible. This is accompanied by emancipating the individual (through the promotion of the realisation that there exists within one the capacity to transform one's circumstances) and by extension society, from ignorance, prejudice of all forms, parochialism, poverty and so forth.

The resonance of Nkomo's thesis consolidates explicitly the cumulative rigour that curriculum and assessment synergy bears on educational systems and practices. Attempts to address barriers to learning and exclusivism are consistent with the principles that underpin the implementation of inclusive education and training system. Such a strategy recognises the need to empower learners by giving them appropriate skills to explore the frontiers of knowledge. It is essential therefore, to create conditions that would enhance alignment of educational systems. In this regard, the Ministry of Education through the National Education Policy Act of 1996 and the Assessment Policy for General Education and Training has been mandated to evaluate and monitor educational standards, provisioning, delivery and performance. The rationale is to ensure that educational policies and practices comply with the principles and values of the Constitution of the Republic of South Africa. Education White Paper 6 identifies the learners with disabilities as the vulnerable towards being excluded from the mainstream education system.

To circumvent this problem the Department of Education in partnership with the provincial education departments and the University of Pretoria conducted the Systemic Evaluation Study for Grade 3 Learners with Disabilities at Special Schools. The participants comprised learners who were blind (LwaB), deaf (LwaD), learning disabled (LwaLD), partially sighted (LwaPS) and physically disabled (LwaPhD). The learners were drawn from 46 schools and totalled 587. The fundamental objectives of the study were to: (i) Determine the context in which learning and teaching is taking place, (ii) Obtain information on learner achievement, (iii) Identify factors that affect achievement, and (iv) Make conclusions about appropriate education intervention (National Report 2002:11)

According to the National Report (2002) the study revealed the need to adapt the curriculum and assessment for the consumption of learners with disabilities must be underpinned by the principles of Access, Equity and Equality. It further called for accelerated training strategies for educators, managers, parents and supporters of learners

with disabilities. The National Report further makes the following critical observation regarding inclusive education and training:

Implementing an IE policy is not about classrooms and schools or for that matter, special, full service and ordinary schools alone. It is about the richly inclusive, nuanced thinking and functioning in all government departments and at all levels. The acid test for the policy must be feasibility, which superficially may be thought to translate into considerations of cost and expertise. From a psychological perspective, however, the implementation of the new policy may be seen to rest more fundamentally on issues of attitude and values, which would affect Access, Equity and Equality by the degree, quality and content of motivation invested in engaging with the changes of the required change. The dynamics especially hold true for achieving the spirit of respect for the dignity and interests of learners with a disability or other barriers to learning and development in SE Programme of South Africa.

The narrative about Nothemba's plight and tribulations is a constant reminder to affirm, question and challenge the rampant stereotypes about disabilities. It is also a call to champion and the rights of all people with disabilities as expressed in the Constitution of South Africa.

### **8. Utilising the research logic to inform policy decisions and practices**

July 2002 will go down the annuals of the South African historiography as both a giant and significant step towards laying down the framework for national research and development for various reasons. In the first instance, it embraces a paradigm shift in research scope and praxis, with the National Biotechnology Strategy taking the centre stage. In the second instance, it creates opportunities for optimal utilisation of existing institutions of higher education to advance research agenda. The new research and development strategy is underpinned by three pillars namely, innovation; science, engineering and technology (SET) human resources and transformation and creating an effective government S&T system and thus function as key drivers of research initiatives.

Of these pillars, human resource development is critical towards optimising available capacities and skills to improve the socio-economic scales of the nation. In a nutshell, the research and development strategy offers plausible opportunities to address issues of 'national competitiveness, improved quality of life and reduction of poverty'. In outlining the context for the research and development strategy, President Mbeki acknowledges the dialectical relationship between investing in research and the general spin-offs derived from such an endeavour. The upsurge of interest in research is a consequence of a plethora of factors, for instance, to promote the culture of accountability within institutions. Research can be used as a monitoring tool and thus provide some form of credibility to justify the huge financial resources invested in research initiatives. On a general level, it can be used to demystify public perceptions and distrust about research initiatives. Evidence gleaned from literature on research studies confirms that research plays a crucial role to provide pertinent data on the quality of educational systems and practices (Mwamwenda, 1994; Nyamapfene, 1999; Harris, 2000). The envisaged

implementation of inclusive education and training requires a rigorous commitment to explore the theoretical and operational dynamics of such a system, thus ensure its success.

In 1999, the Gauteng Department of Education (GDE) hosted a conference on '*Educator as Researcher*'. One of the primary aims of the conference was "*To move research agenda to the center of change process in education*". The long-term vision of the conference was to encourage dialogue about strategies institutions might use to facilitate educators' transition to the world of research in order to become 'critical scholars'. The extent to which educators can competently undertake research is still contestable. This has to be understood within the historiography of South Africa. During apartheid educators had no business with research, theirs was to teach, teach and teach! No programmes existed to empower them with research skills and strategies that would impact on their teaching and scholarship. In a nutshell, South Africa cannot micro wave educators into top class researchers over night. It is a process that requires time, training, commitment and resources. According to Nyamapfene (1999) doing research is an imperative requirement for those entrusted with the responsibility of academia. Research capacity at institutional level needs jacking up to match academic and policy challenges (Noble, 1989 and Mwamwenda, 1994).

The role of educators (teachers) in research must be explored and affirmed as a plausible strategy that will enhance their intellectual growth as classroom practitioners and policy think tanks. Their active involvement in research will enhance the strategic vision of the Department of Education in terms of the envisaged implementation of inclusive education and training system in South Africa. Attempts to encourage educators to become 'critical scholars' and actively participate in research projects should be underpinned by: (i) Strong research leadership, (ii) Mentoring and research capacity building, (iii) Plausible development plan that clearly articulates institutional vision and research priorities, and (iv) Effective organisation and management of resources to optimise research outputs.

The impact of research in educational transformation and curriculum reconfiguration is well documented. According to Mwamwenda (1994) research plays a crucial role in shaping up educational systems. For instance, it helps institutions to redefine their core businesses within the ever- changing global context. He also argues that decision-making in education should be a consequence of research outputs. He further concedes that lack of research output would compromise the image of the institution both nationally and internationally. In this case, it would even compromise the policy systems of such a country. In addition, Wickham and Bailey (2000) believe that research further enhances: (i) Sharing and collaboration among stakeholders, (ii) Dialogue on various educational issues, (iii) Communication between teachers, learners and policy planners, (iv) Performance levels of teachers and learners, (v) Teacher designed staff development initiatives, (vi) Developing priorities for school planning, and (vii) Development to new forms of knowledge.

The quality of research outputs can be optimised by developing the culture of research within institutions of learning and relevant support systems. The strategy for achieving such a task is succinctly elaborated by Gaynor (1998, p. 70):

Pedagogical research must be strengthened to improve the quality of education. For example, in-service and action research should be carried out, and the research should be communicated to teachers in an effective manner. Schools must be allowed to have a direct input into the research process by, for example, becoming involved in research design and implementation.

A cumulative analysis of scholarship on research confirms the notion that if research output is utilised intelligently, it can empower institutions with appropriate skills on curriculum and assessment alignment strategies. Through systematic research plans, institutions can align research outputs with tuition, thus ensuring a 'thermotaxis' between educational policies and classroom practices. This would further enhance the utility value of the research logic as an integral part of policy formulation and decision making strategy. Furthermore, it would also enhance the application of the National Disability Strategy with regard to the plight of people with disability in a post apartheid South Africa.

## 9. Conclusion

The dictum *'Race and exclusion were the decadent and immoral factors that determined the place of our innocent and vulnerable children'* (EWP6, 2001:4) seems to be an appropriate summation of the thesis of this paper. The Story of Nothemba is but one of the many untold narratives about the person struggles and tragedies that many South Africans with disabilities endured during the apartheid regime and ultimately resigned into embracing as their identity and a definitive summation of their biographies. The envisaged implementation of an Inclusive Education and Training System has to be crafted and operationalised within the spirit and mandate of the Constitution of South Africa which among other things, outlaws any form of discrimination, including the marginalisation of people with disability.

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### Appendix

<b>Provinces</b>	<b># of Special Schools</b>	<b># of Learners in Special Schools</b>	<b>% of Learners in Special Schools</b>	<b>% of Total No of Special Schools in Province</b>	<b>Per Learner Expenditure</b>
Eastern Cape	41	6483	0.28%	10.79%	13746
Free State	19	3127	0.40%	5.00%	22627
Gauteng	96	25451	1.62%	25.26%	11049
KwaZulu-Natal	58	7631	0.28%	15.26%	21254
Mpumalanga	15	2692	0.29%	3.95%	17839
Northern Cape	8	1392	0.68%	2.11%	15749
Northern Province/Limpopo	19	4250	0.23%	5.00%	16609
North West	42	4364	0.46%	11.05%	13015
Western Cape	82	9213	0.96%	21.58%	28635
<b>Totals</b>	<b>380</b>	<b>64603</b>	<b>0.52%</b>	<b>100.00%</b>	<b>17838</b>

Adapted from White Paper 6 (p.13)

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