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## Individual Education Plan (IEP) Development For Children With Developmental Disabilities In Ontario's Public Schools: A Narrative Case Study Inquiry

Karen P. Gregory, *The University of Western Ontario*

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A thesis submitted in partial fulfillment of the requirements for the Doctor of Philosophy degree in Education

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**INDIVIDUAL EDUCATION PLAN (IEP) DEVELOPMENT  
FOR CHILDREN WITH DEVELOPMENTAL DISABILITIES IN  
ONTARIO'S PUBLIC SCHOOLS: A NARRATIVE CASE STUDY INQUIRY**

by

Karen P. Coleman Gregory

Graduate Program in Education

A thesis submitted in partial fulfillment of

the requirements for the degree of

Doctor of Philosophy

The School of Graduate and Postdoctoral Studies

The University of Western Ontario

London, Ontario, Canada

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## **Abstract**

This qualitative study employs case study and narrative inquiry approaches to examine the beliefs, practices and experiences of elementary classroom teachers in Ontario, Canada, as they engage in the development of Individual Education Plans (IEPs) for children with Intellectual Developmental Disability (IDD). The study focuses on IEP development for students in both regular education and special education classroom settings. Attention is given to the ways of thinking about disability, IDD, and special educational needs that impact on current practices related to IEP development. In that there is limited research that offers a theoretical explanation of the IEP process, this study applies the critical social theoretical perspectives of Pierre Bourdieu and theorists working in Disability Studies/Disability Studies in Education to the phenomenon of IEP development. Narrative data collected from interviews with fourteen teachers working in three school boards and from the review of educational documents as artifacts from the field were critically analyzed. Four major thematic areas were brought together to explain the narratives underpinning teachers' thinking and practices. These include Knowledge and Conceptualizations, IEP Pedagogical Practices, Concentration of Individualized Curricula, and Relational Factors and Influences that involve the interplay of a number of factors impacting on IEP development such as classroom context, school and school board culture, and teacher self-efficacy and satisfaction. This research suggests that IEP development involves a dynamic labelling process through which the learning identities of students are constructed and reproduced based on deficit-based thinking about disability and special educational needs. As such, the IEP process may perpetuate notions of ableism within contemporary educational

discourse that contribute to the marginalization and/or exclusion of students with disability in schools. Findings draw attention to key issues related to the IEP and to considerations for inclusive educational practice. Implications of the study extend to broader questions about the function of the IEP process, the meanings ascribed to disability and special educational needs through this process, and the powerful narratives used to position students with disabilities in classrooms across Ontario and elsewhere.

**Keywords:** Individual Education Plan (IEP), Intellectual Developmental Disability (IDD), Case Study, Narrative Inquiry, Critical Social Theory, Pierre Bourdieu, Disability Theory, Inclusive Education, Special Education

## Declaration

The research reported on in this thesis is the original work of the researcher in the fulfillment of the requirement for a doctoral degree and has not been used for the award of any other degree. This dissertation is the original, intellectual, unpublished and independent work of the author in completion of a doctorate degree at Western University, London, Ontario. All the work presented henceforth was the result of the research study “*Individual Education Plan (IEP) Development for Children with Developmental Disabilities in Ontario’s Public Schools: A Narrative Inquiry*” (ethics certificate # 1305-1) approved by the Research Ethics Board, Faculty of Education, University of Western Ontario. As the sole investigator for the study, I was responsible for all areas of the study, its concept formation, research design, data collection and analysis, and the reporting and writing of research results and outcomes.

## **Dedication**

To my sons Robin and Andrew who taught me to enter the arena, to 'dare greatly', and to see the possibilities in front of me.

## **Acknowledgments**

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## Chapter 1

### Introduction to Study

*A disability in and of itself is not a tragedy. It is only an occasion to provoke a tragedy.*

(L.S. Vygotsky, trans. 1993)

In education, complex issues exist about the ways in which educators conceptualize and understand disability and special educational needs. These include issues concerning how teachers engage with disability and difference in practice as they respond to the diverse educational needs of students. This qualitative study adopts the view that the Individual Education Plan (IEP) process embodies these issues, providing an important window into the ways in which educators think about and deal with disability in schools. By employing a critical theoretical lens and a case study approach using narrative inquiry, this research seeks to explore the phenomenon of IEP development. The study generates important insights into the underlying beliefs, conceptualizations, practices and experiences of a purposefully selected group of elementary classroom teachers in Ontario as they engage in IEP development for their students with Intellectual Developmental Disability (IDD). This narrative case study captures the contextual richness of classroom teachers' storied accounts that tell about the collective thinking and pedagogical practices involved in the IEP process as the case under study to provide an in-depth picture of this process and the frames of reference used in the context of teachers' real-life work in developing IEPs. Supplementing

inquiry into the particulars of teachers' individual narrative accounts and experiences (Stake, 1995, 2005) is the review of Ontario Ministry of Education and school board documents that relate to the IEP. Disability theoretical perspectives and the critical social theoretical concepts of Pierre Bourdieu are used to inform the study and the approach taken in the analysis and interpretation of data. Behind this inquiry is the basic yet critical question of how educators in Ontario conceptualize disability and characterize the educational interests and needs of children with disability for teaching and learning.

### **Chapter Overview**

This chapter begins with an overview of the background and context to the study that frames the problem and purpose of the research. The educational meaning of the IEP is clarified along with its historical roots and the socio-political influences that underpin the IEP process in Ontario and in other education systems around the world. Following this engagement with the historical background of the IEP, my voice as a special educator is brought into the research context to highlight my experiences and perspectives as the researcher taking up this study. The chapter then introduces the research problem, the purpose of the study, the scope of the research, and the research questions that were developed. The research design is identified, describing the theoretical and qualitative methodological traditions chosen for conducting the research. Specific points of concern around the meaning of disability, interpretation of special educational needs, and the nature of pedagogical practices are identified that speak to the scholarly context for the study and to why the IEP development process emerged for



me as a compelling issue in the changing fields of special education, disability in education, and inclusive education. Finally, the chapter concludes with an outline of the organization of the thesis.

## **Background and Context**

This study was constructed out of the complex interplay between my own professional experience as an educator, my observations of issues related to the IEP process as I worked with other educators as a special education consultant, and my knowledge of the existing research literature in special education, inclusive education, and disability studies. Given my interest in children with intellectual developmental disabilities, the study focuses on IEP development as it pertains to students who have been identified or labelled as “exceptional pupils” under the Ontario Ministry of Education Category of Exceptionality - *Intellectual: Developmental Disability* (IDD) through the Identification, Placement and Review Committee (IPRC) process. Typically these students have a diagnosis of intellectual disability due to lower cognitive functioning in conjunction with difficulties in adaptive functioning and daily life skills. An important point for this study is that various terms are used in Ontario’s education system as well as in other school systems and the research literature to denote students requiring IEPs. These include terms such as ‘exceptional’ students, students with special educational needs, and students with disability. For this study, the use of the term exceptionality means exceptionality associated with a disability such as IDD. Specific terms and definitions used in this research are clarified in Appendix A: Definitions of Key Terminology.

I chose to focus on children with IDD in that in Ontario, the individualized educational program is typically determined by what the classroom teacher considers to be appropriate for the student according to beliefs and assumptions about the learning needs and capabilities of the individual. As a result, for many students, the IEP focuses on an *alternative* education program (Appendix A) that involves learning goals and outcomes that are separate from the general Ontario curriculum. Instead, the nature of the alternative program is typically left to teacher discretion based on teachers' knowledge of the student, on teachers' beliefs and perceptions about the student's individual needs, and on approaches taken to the individualization of learning goals and outcomes drawn from these understandings. Consequently, teachers have a great deal of power in determining the kind of curricula and educational outcomes for students with IDD. Attending to this issue is essential when considering the nature of school programs provided to these children within Ontario's neoliberal educational climate that is concerned with equitable learning outcomes for all students and high standards of achievement of the provincial curriculum. In light of this concern, inquiry into the IEP process within this current educational climate is called for that considers the thinking and actions of classroom teachers, the localized power of teachers in determining the school programs for students, and the metanarratives of educational documents that inform the IEP process within schools.

In the provision of special education in Canadian schools and in education systems around the world, the use of the Individual Education Plan (IEP) is ubiquitous. Although different names are used to represent similar plans across Canada, the basic

concept of these plans is the same (Mattatall, 2011). The IEP is a document that outlines the specialized educational program and/or supports and services to be provided for students who require special education. Over the past three decades in Ontario's public school system, the systematic treatment of students classified as exceptional pupils tends to rely on the IEP process. Hence, teachers have come to understand the IEP as a necessary tool for educating students with exceptionalities. In effect, the IEP seems premised upon a democratic ideal that views the individualization of school programs (curricula and instruction) as the best and most accountable approach for educating students with exceptionality. Conceptions about the meaning of individualizing educational programs arise from core policy documents, such as Regulation 181/98 of the Education Act of Ontario, that describe what constitutes an individualized education plan and the assumptions for interpreting the meaning of the IEP. Grounded in the individualization of a school program is the fundamental notion that all students with exceptionalities have the right to a free public education designed to meet their particular strengths and needs in learning.

McLaughlin (2010) points out that in disability policies, individualization is central to the concept of equality of opportunity and arises from the heterogeneous nature of disabilities and the impact of disabling conditions on individual functioning. Therefore, the goal is to consider the strengths and needs of each person, the accommodations, services, and supports required by the person, and "requires that educational programs and policies be flexible enough to respond to individual differences and not be based solely on categories, labels, preconceptions, or biases"

(McLaughlin, 2010, p. 268). As such, the procedural and content requirements for the individualization of school programs are operationalized through the IEP process. Given the level of importance assigned to the IEP by educators, parents, and others, my contention for undertaking this study is that the IEP process, as it operates in actual teacher practice in Ontario's school system, requires a much deeper and critical understanding.

### **The IEP: Historical Roots**

The IEP has its origins in 1975 when the federal government in the United States of America passed the *Education for All Handicapped Children Act* (Public Law 94-142). This law appears to have been spurred on by the civil rights movement of the 1960s and 1970s and enacted in response to public pressure to recognize and uphold the democratic rights of all individuals to a free and appropriate education (Goodman & Bond, 1993). Now known as the *Individuals with Disabilities Education Improvement Act* (IDEIA 2004), *Public Law 94-142* (PL 94-142) guaranteed educational equality for all students with disabilities. Educational equality was held to mean equal access to a free and appropriate public education in the least restrictive environment alongside non-disabled peers to the maximum extent possible. This legislation reformed American education by making a free and appropriate public education available to all students, regardless of need or disability.

In the years following 1975, special education continued to emerge as an increasingly segregated system with its own practices, regulations, staffing, and sets of beliefs about students that the system purported to serve (Connor & Ferri, 2007;

Lalvani, 2013). The purpose of the IEP was to ensure adequate service and the professional accountability of schools in meeting the educational needs of students with disabilities through individualized programming. The educational rights of all students in the United States were re-affirmed in subsequent legislation through the *Individuals with Disabilities Education Act* (IDEA 1997), the *No Child Left Behind Act* (2001), and the *Individuals with Disabilities Education Improvement Act* (IDEIA 2004). Within the present climate of standards-based education, standards-based IEPs have become the focus of IEP development practice in the United States. Policy regulations require that a student's IEP include goals that are based on the grade level academic content standards in which the student is enrolled. Therefore IEP goals are directly linked to state grade level content standards and assessments and to moving the student toward attaining state-determined standards. At the same time, IDEIA (2004) emphasizes that special education is designed to meet the unique needs of students with disabilities, while acknowledging that an appropriate education involves individualized treatment that may result in unequal educational and functional outcomes (McLaughlin, 2010).

### **The IEP: Ontario Context**

Importantly, PL94-142 legislation in the United States initiated a similar change in how Ontario's education system viewed and approached the education of children with disabilities. While not afforded the same legal status as in the United States, the IEP process in Ontario is considered the legitimate means for addressing and meeting the special educational needs of students. With the passing of *The Education Amendment Act, 1980* (S.O. 1980, c.61), otherwise known as *Bill 82*, universal access

to publicly funded education was made available to all children in the province regardless of disability or need. Up until this time, many children with disabilities, particularly with severe disabilities, were excluded from the public school system. Bill 82 established the vision for educating all students with disabilities and moved responsibility for their schooling to all publicly funded school boards. This legislation also introduced a formal process for the identification and placement of exceptional students similar to that in the United States.

With Bill 82, school boards were required to provide appropriate special education programs and services for its students with exceptionalities either directly or through service agreements with other school boards; placement of students could be in regular education classrooms, special education classrooms, or in specialized schools (Bowlby et al., 2001). Importantly, Bill 82 introduced the notion of the IEP process as the means through which a student's special education program would be planned, developed and implemented. In short, with this legislation, special education became an integral part of the education system in Ontario and changed dramatically the way in which students with disabilities were to be educated (Bennett et al., 2008; Bowlby et al., 2001; Hutchinson & Martin, 2012; Porter & Smith, 2011).

Prior to 1998, the requirement for an IEP to be in place for every student with a disability was implied but not enforced; until 1998 no specific legislative stipulation was in place to direct the contents of the IEP (Bowlby et al., 2001). For most school boards in Ontario, the use of a variety of IEP forms was common practice. In 1998, the IEP became an official requirement under *The Ontario Education Act - Regulation 181/98*

(O, Reg. 181/98) for any student identified as an exceptional student through the Identification, Placement and Review Committee (IPRC) process. Regulation 181/98 set out specific requirements for the development and implementation of the IEP. These state that the IEP must include (a) specific educational expectations for the pupil, (b) an outline of the special education program and/or services and supports to be received by the pupil, and, (c) a statement of the methods by which the pupil's progress will be reviewed; it also established the responsibility of the school principal for ensuring the IEP outlined an appropriate special education program and services for the student (O. Reg. 181/98, s. 6(3)).

At present in Ontario, the development, implementation, and monitoring of the IEP is regulated by the Ministry of Education through its policies, standards and guidelines (*Ontario Ministry of Education Individual Education Plans: Standards for Development, Program Planning, and Implementation* 2000; *Ontario Ministry of Education Individual Education Plan Resource Guide* 2004) that are in accordance with Regulation 181/98 of the *Education Act*, 1990. Key definitions relative to the IEP are set out in Appendix A and the components of IEP development are listed in Appendix B.

Currently in the province, a student is given an IEP as the result of being identified as an exceptional pupil through the IPRC process or because the student requires a special education program. In 2010, students not formally identified as exceptional pupils through the IPRC process began to be referred to by the Ontario Ministry of Education as "students with special education needs" (Hutchinson & Martin, 2012, p. 38). In light of this practice, Hutchinson and Martin (2012) describe a changing

context of IEPs in Ontario due to more recent Ministry of Education documents such as *Learning for All K-12* (Draft 2009) that focus on the need for enhancing the measurability and accountability of IEPs. This issue is reflected in the literature concerning teachers' practices for writing measurable and meaningful IEP goals and expectations (Capizzi, 2008; Goodman & Bond, 1993; Hessler & Konrad, 2008).

The IEP process in Ontario, as in the United States, is embedded within the special education system which is often described as a separate but parallel system to the general or regular education system. Thomas and Loxley (2007) provide a general sentiment in this regard by noting that special education took root in the twentieth century founded on the rationale that people felt a separate system of "special education was a Good Thing" and on arguments "about the best interests of separated children" (p. 22). Thomas and Loxley state:

Special education has grown for many reasons. Prime among these has been the setting on a pedestal of certain kinds of 'knowledge': theoretical, empirical, and above all, scientific...[The] putative character of this knowledge...has created a false legitimacy for the growth of special education and the activities of special educators. (p. 23)

As Linton (1998) observes, this bifurcated system lent credibility to the idea that there were, and are, two different kinds of learners who require different forms of schooling. The idea of individualizing educational programs can be argued as reifying the belief that students with disabilities naturally require a different form of education. As a result,



the IEP came to be regarded as the necessary tool for appropriately responding to the diversity of students' individual needs as they relate to disability or exceptionality.

### **My Story as the Researcher**

My personal narrative as the researcher has to be understood in light of my own professional path as an educator and the experiences and knowledge that I brought to the research work. I came to the study with perspectives and values shaped by over thirty years of teaching and working in Ontario's education system. My motive for doing this research came from the meshing of this knowledge and experience with my interest in conducting doctoral research that fit within the fields of critical special education, disability studies in education, and inclusive education. As part of the research process, I was constantly reflecting on how my own story was important to the way in which I engaged in the research and how I related to study participants, made decisions, and analyzed and interpreted data.

I had come to see a lot of my work in special education as often rooted in deficit-based ways of thinking about students with a disability or differences in learning needs. I observed that generally, the views and beliefs held about students went unquestioned by principals and other staff who saw teachers in special education as possessing the necessary knowledge and skills to address the learning needs of students. When faced with challenges in knowing what to do for a student who was struggling or had some type of diagnosis that suggested learning would be problematic, the easy solution was to put them on an IEP. This was considered the most logical and effective means to make

the special needs of particular students real and definitive in order to know what to do in the classroom.

As a special education consultant, I actively worked with administrators, teachers, and others to ensure students were provided with the appropriate educational programs and supports they required. I joined in the larger conversations about meeting the needs of students while discerning the stories of teachers, administrators, and parents in order to identify students with exceptionalities according to a continual stream of diagnoses and assessed deficits. I often felt the tensions that existed and witnessed the silencing of voices in the process – sometimes those of parents, students, and even classroom teachers whose participation in IEP meetings was governed by the practices of the school. I stepped in and out of my role as a board ‘expert’ in special education, caught between my voice as a representative of the school board and my personal voice as a caring educator that wanted to question what was really being done to and said about students. My story is similar to Broderick’s (2013) who says about herself, “I operated as a cog in the institutional bureaucracies that employed me and systematically subjugated ...people [students with disabilities]” (Collins & Broderick, 2013, p. 1268).

As I upheld my role, I began to see that a lot of what the IEP process involved seemed innately and ironically counterproductive to provincial educational agendas and policies concerned with creating equitable outcomes and inclusive educational opportunities for all students. Importantly, while the IEP process conveyed respect for individual diversity in learning, what came into focus for me was how teachers’ own beliefs and perspectives about disability and special educational needs seemed to direct

what went into the IEP, especially in terms of IEP goals and educational outcomes identified for students with IDD. In working with teachers, I came to see they often had difficulty articulating why certain choices were made for these students, especially when developing alternative programs. The simple answer they gave was that they just knew that this was what the student needed to work on and be able to do. At the same time, it became clear to me that teachers were narrating their own identities through the IEP process, writing their own stories about who they were and would be as the teacher in the education of the student.

I came to this study with the view that the IEP development process is an integral part of how educators come to understand and tell about disability, special needs in education, and in turn special education provision itself. Inquiry into this process emerged as an important means to interrogate the 'ideological yoke' of special educational discourse (Brantlinger, 1997). My belief is that the IEP tells a particular story about the student. The stories told are spoken by professional voices (Smith, 1999; Skrtic, 1995) that narrate the kind of educational outcomes students are to achieve and the ways in which they are mapped on the social and educational landscape (Smith, 1999). Furthermore, the IEP development process is a form of pedagogical action that I see as shaping the participatory spaces (Steeves, 2006) of students within schools.

### **The Research Problem**

The research problem under investigation deals with IEP development for students with IDD within public school systems in Ontario. This problem is part of the larger conversations around the IEP, its use and effectiveness in special education

provision, and the meaning of disability and special needs in education. The study is situated within the scholarly literature concerned with IEP processes, special educational needs, and Disability Studies (DS) and Disability Studies in Education (DSE). These works address issues related to educators' responses to disability, pedagogical practice, and the beliefs and understandings about disability and special needs that shape these particular responses. Baglieri et al. (2011) suggest, along with other authors, that at the core of research in these areas are questions that thoroughly inquire into (a) how specialized special education is for learners with disabilities, (b) the nature of practices and the extent to which a practice has a constructive impact on students with disabilities, and, (c) how disability, special needs, and differences are conceptualized (Brantlinger et al., 2005; Connor, 2012; Ferri, 2009; Gable, A., 2014; Gable & Connor, 2009; Goodley, 2014; Morton et al., 2013; Rogers, 2013; Slee, 2001, 2011, 2013; Thomas & Loxley, 2007; Ypinazar & Pagliano, 2004). Despite the significance of these issues, little research has asked these questions in relationship to IEP processes. The research problem in this study therefore draws on these critical and provoking questions to inquire into the perceptions, beliefs, and practices of teachers in Ontario that construct the story of IEP development for their students with IDD.

### **Research Purpose**

The purpose of this qualitative case study was to examine the narrative accounts of elementary classroom teachers and the discourses expressed in educational policy documents concerning the IEP in order to understand the beliefs, perceptions, frames of reference and practices underlying the IEP process for students with IDD. In a broad

sense, this study attends to the ways in which teachers in Ontario discursively construct disability and special needs, and in turn, mitigate disability and difference for teaching and learning. Seeking a narrative understanding of IEP development follows from knowing that classroom teachers are central to the beliefs and actions adopted in this process, and that their personal knowledge is at the heart of this work in teaching. Thus, a deeper understanding of the IEP process in actual practice is needed to shed important light on the meanings, perspectives and practices that shape the IEP process in Ontario's schools. This inquiry generates a richer awareness of the ways in which teachers' understandings about IDD and special educational needs impact on IEP development and subsequently the nature of educational programs and outcomes afforded these students across inclusive and non-inclusive classroom settings.

### **Scope of the Research**

The scope of the research was narrowed down to investigating IEP development by elementary classroom teachers representing three school boards in southwestern Ontario. The study concentrates on teachers who work with students with IDD in regular education classes or in special education classrooms. Six main objectives define the aims of the study: (1) to understand classroom teachers' underlying beliefs about students with IDD when developing IEPs, (2) to identify the knowledge sources and frames of reference informing teachers' beliefs and understandings, (3) to identify the models of disability from which teachers draw their understandings about students and special educational needs, (4) to apply disability and critical social theoretical lenses to examining IEP development, (5) to generate insights into teachers' choices of IEP

curricular content, and, (6) to bring attention to how particular narratives position students with IDD in certain ways on the school landscape.

### **Research Questions**

In that this study looks at IEP development by classroom teachers who work with elementary students identified as exceptional pupils under the Ontario Ministry of Education category Intellectual: Developmental Disability (IDD), the overall research question asked: What are the prevailing narratives that inform and direct IEP development for children with intellectual developmental disabilities in Ontario and what are the embedded components of these narratives? To answer this question, five sub-questions were addressed:

- (1) How do elementary classroom teachers conceptualize and understand IDD and special educational needs?
- (2) How do models of disability and classification systems of exceptionality inform teachers' work in the development of IEPs?
- (3) What factors influence teachers' work in IEP development for students with IDD?
- (4) What beliefs and assumptions do teachers mobilize and narrate to explain IEP curricular content for children with IDD?
- (5) In what ways do educational documents related to the IEP influence teachers' work in the IEP development process?

## **Research Design**

In that a qualitative research design invites the stories and accounts of participants within the natural context of their daily lives and experiences, I worked with case study and narrative inquiry methodologies using the qualitative research methods of interviewing, document reviews, and informal observation. These methodologies were used as complementary approaches through which I was able to situate the study within the real-world context of teachers' work in the classroom. Specifically, a narrative inquiry approach was used as a means to access and examine the storied accounts of teachers' thinking and involvement in the IEP development process within specific school contexts. In this way, the study amplifies the voices and experiences of teachers, capturing the narratives that tell about their thinking and actions in actual practice. A case study approach helped to encapsulate my research concern in order to comprehensively investigate the particularities of the narratives that shape and inform the IEP development process for students with IDD. The thinking and practices that surfaced within the individual narrative accounts of teachers became the meaningful cases or units of analysis to be studied (Patton, 2002) to provide a holistic, in-depth description of how the IEP process, individualized educational programs, IDD, and special educational needs are understood and mediated in the context of teachers' work.

Using semi-structured interviews and informal conversations during periods of classroom observation, this research design promoted teachers to openly discuss their beliefs and perceptions of students, bringing to light the meanings, understandings, and pedagogical practices that underpinned the development of IEPs for their students with

IDD. In doing the research, I took into consideration teachers' experiences and stories in terms of their personal, social, and educational context in time and space. These multiple perspectives impart value and authenticity to a "mere experience" (Clandinin & Connelly, 2000, p. 50). Supplemented by the review of education documents, I examined the institutional discourses of texts to uncover the meanings conveyed in order to consider how these narratives potentially influence teachers' understandings about students with exceptionality or disability and the IEP process.

To frame the theoretical thinking for this study, I chose to apply the work of scholars in disability studies, disability studies in education, and critical social theory focused on the theoretical thinking tools of Pierre Bourdieu (1973, 1977, 1983, 1985, 1986, 1989, 1991, 1992, 1993, 1997, 1998, 1999). Critical social theory provides the conceptual tools for research interested in studying and understanding the world for the purpose of critiquing and changing it, focusing on how social injustice related to power and oppression shape everyday life and human experience (Kincheloe & McLaren, 2005; Patton, 2002). Bourdieu's (1977, 1989, 1993, 1998; Bourdieu & Passeron, 1990, 1996; Bourdieu & Wacquant, 1989, 1992) critical social theoretical perspectives help to place the IEP development process within the context of broader social and educational structures and systems, and highlight tacit or hidden assumptions that exist within these structures (Freire, 1970). Guided by my theoretical framework in the analysis and interpretation of data, not only was a more comprehensive understanding of the IEP process realized, but in a way that previous studies have rarely, if ever, considered.



## **Significance of the Research**

This study is an attempt to explore the accepted meanings assigned to intellectual developmental disability, special educational needs, and individualized education in the context of the IEP process and to critically examine what constitutes the development of IEPs for children with IDD. It offers an important lens into teachers' understandings about students and the ways in which educators respond to these learners through the IEP process to create their participatory spaces in schools for teaching and learning. In that little research has specifically brought together inquiry into the IEP process and the ways in which teachers understand, interpret, and engage with disability and special educational needs in actual practice, this research contributes to a deeper understanding of teachers' meaning making about and conceptualizations of disability, IDD, and special needs. Furthermore, in that the literature is lacking in research that offers a theoretical understanding of the IEP process, this study provides a theoretical framework through which IEP development in current educational practice can be considered. By adopting a Bourdieuan lens complemented by disability theoretical perspectives, this critical inquiry sheds valuable light on institutional ways of thinking that shape what teachers do, know and how they come to know it (Grenfell & James, 2004). The study further speaks to issues of equity and inclusivity in education which call for asking important questions about the processes that exist in schools for engaging with student difference and the ways in which teachers think about their work and practices (Porter & Smith, 2011).

## **Organization of Thesis**

This thesis is organized into seven chapters. This first chapter introduces the study, describing the background information that situates the research within the historical and current special education context in Ontario and within my own personal experience as an educator. The research issue, purpose of the study, research questions, and the scope and significance of the work are outlined along with a broad description of the research design. Chapter 2 examines the scholarly literature that informs the study, the parameters of the research, and accordingly, the research problem and questions addressed. In Chapter 3, I discuss the theoretical framework guiding the study that draws on critical social theory, the theoretical constructs of Pierre Bourdieu, and the theoretical perspectives of scholars within the field of Disability Studies (DS) and Disability Studies in Education (DSE). Chapter 4 explains the research methodology and procedures used to generate and analyze data. Ethical considerations and issues of trustworthiness and credibility of the research are also addressed. Chapter 5 outlines my research findings based on interview data collected from teachers and textual data gathered from the review of educational documents. In chapter 6, I discuss the research outcomes, presenting my interpretation of the study's findings. The thesis concludes with chapter 7 where I address the significance and implications of the research, the limitations to be considered, areas for further questioning and investigation, and provide my final thoughts and reflections on the study.

## Chapter 2

### Review of the Literature

*A literature review “is situated, partial, perspectival...a critically useful interpretation and unpacking of a problematic” through which we get a sense of the field.*

(Lather, 1999, p. 3)

#### Chapter Overview

This chapter offers a review of the predominant scholarly literature that provided the foundation for the research issue under investigation and rationale for the study. The review focuses on the literature as it relates to disability meaning and debates, IDD, special educational needs, and the IEP. The literature review was conducted to gain insights into the research issue under study and to synthesize the existing literature “in a way that permits a new perspective” (Boote & Beile, 2005, p. 3-4). I define the scope of the review in terms of its areas of focus, literature sources examined, and the contributions and conclusions that can be taken from these works which have relevancy for the present research and the contributions that it makes to the existing knowledge base.

The chapter first notes the approach taken to locate the literature addressed. The chapter then moves to explaining the focus areas for the review followed by an in-depth discussion of these works. Core ideas and key points are noted that are important to conceptually deconstructing and reconstructing the key areas of my research issue and to ‘weave the streams of literature together’ (Torraco, 2005). Similarities and differences

in the literature are also identified that speak to issues related to my own research direction. Areas for further research are identified to situate my study within this scholarly work. Given this review, the foundation is laid for framing the provocative questions and propositions that guided the present inquiry.

### **Review Approach**

The boundaries of this literature review were set by limiting its focus to research-based works and scholarly material addressing current issues in IEP processes, disability/disability studies in education, IDD, and special educational needs. The review was based on scholarly literature derived from sources accessed through systematic library searches using traditional strategies and online search engines such as ProQuest, PsycINFO, and ERIC. The methodology of ‘pearl-harvesting’ (Sandieson et al., 2010) and the process of citation tracking were also used to locate relevant works. The literature reviewed includes two broad categories: (a) conceptual pieces and position papers to theoretically situate the research issue and to make sense of the existing fields of study important to my work, and, (b) empirical research relative to my inquiry. Much of the relevant literature was produced by authors in the United Kingdom (UK), the United States (USA), Scandinavia, New Zealand, and Australia. These sources represent studies, articles and position papers from peer reviewed journals, and other publications that include professional books, handbook chapters, reports, government publications, and unpublished doctoral dissertations related to the IEP. Other than locating a few key sources published prior to 2000, the review primarily focuses on scholarly works produced between 2000 and 2014.

## **The Scholarly Literature**

This review of the literature links my study to the works of others who I take to provide the important knowledge base for understanding the research issue investigated, the aims and purpose of my study, and the social and educational significance of the research problem. I address the works of DS/DSE scholars concerned with defining impairment and disability in that these works contribute to understanding the cultural formations of impairment as they relate to ‘developmental disabilities’, the social, historical, cultural, political, and educational conditions of developmental disabilities, and the wider struggles for the meaning of schooling and pedagogy (Goodley, 2007; Goodley & Roets, 2008). By addressing intellectual/developmental disability, DS/DSE studies literature, and works concerned with special educational needs, my purpose is to bring to the forefront the research and thinking of scholars that are relevant to investigating educators’ construction and understanding of ‘developmental disability’ in relationship to the IEP process. These authors offer useful insights for studying the ways that school systems address the ‘problematic’ of children with developmental disability and the ways in which IEP processes are organized and function to shape children’s lives in schools. Importantly, I feel knowledge of this work is essential to understanding the aspects of the IEP process that are critical to my study’s purpose and questions, and helps to clarify what led me to deal with my research problem.

### ***Intellectual Developmental Disability***

To investigate the stories and accounts of ‘developmental disability’ articulated by teachers in Ontario as they work through the practice of IEP development requires

understanding the commonly understood definitions of developmental disability. I offer a brief overview of the construct of intellectual developmental disability (IDD) as presented in the literature in order to clarify the meanings assigned to this diagnosis. This is done to help situate teachers' conceptualizations of developmental disability that are important to their pedagogical practices surrounding IEP development.

In particular, the literature on IDD provides insight into the complexities of this disability and the forces that shape and continue to shape how it is defined in educational and other fields of practice. Much of the literature typically includes reference to the historical classification and treatment of individuals with cognitive impairment and mental retardation. To address these works is beyond the scope of this thesis. I do note however, that common definitions appear rooted in medical model perspectives that engage with notions of impaired bodies, biological limitations, cognitive impairment, and deficiencies in normative areas of development. Predominate in the literature is the use of medical, clinical and scientific frames of reference that seem to direct the definition, measurement, and classification of intellectual developmental disability according to specific diagnostic criteria. For example, IQ measurement and assessment of adaptive functioning appear to provide the foundations for determining the construct of this disability such as described by the *Diagnostic and Statistical Manual of Mental Disorders* (DSM-IV, DSM-V) published by the American Psychiatric Association.

To highlight the number of various views that have existed in defining intellectual/developmental disability, Jorgensen et al.(2007) note that The American

Association on Intellectual and Developmental Disabilities (AAIDD), formerly The American Association on Mental Retardation (AAMR), has changed its definition of “*intellectual disability*” ten times since 1908. The current definition recognizes a multidimensional and ecological approach to reflect the interaction of the person with his/her environment and the outcomes of that interaction with respect to individual independence, relationships, contributions to society, participation in the school and community, and personal well-being (AAIDD, 2010).

Whitaker (2013) suggests the need to define intellectual developmental disability in a way that is more useful for stakeholders including educators. He states that defining intellectual disability necessitates other considerations such as removing ‘cut-off scores’, assuming fluidity and impermanence over time, and adopting a multiplicity of constructs that fit with the purpose of educators, researchers, doctors, and service providers. Furthermore, he argues that current constructs of intellectual disability are “premised on an assumption of basic similarity in the population of people to whom the label intellectual disability is applied” and fail to recognize the diversity of this population as for the rest of the population (p. 121). Whitaker also contends that defining intellectual disability in terms of a specific IQ point is not valid and that adaptive behaviour is an ‘invented construct’ “with scales that are arbitrary in content and lacking in both theoretical and empirical support” (p. 69, 89). Other valuable insights emerge from the work of Smith (1999) who states:

[People with] developmental disabilities inhabit landscapes that are

pathologized and marginalized, surrounded by impermeable borders created by processes [the IEP process]...although seen as necessary by some in order to obtain adequate services for their survival in schools and other institutions...these borders do not benefit those they contain. (p. 117)

Goodley and Roets (2008) target the normative constructions of developmental disabilities to demonstrate the ways in which the cultural formations of impairment, as they relate to developmental disabilities, might be understood. They claim that people with labels such as developmental impairments remain on the periphery of critical research and political debate. Similarly, Shogren et al. (2006) state that in their analysis of studies concerned with intellectual disability, research based on a conceptualization of people's strengths and capabilities as a means to promote meaningful participation, inclusion, and quality of life outcomes "represents a minority of the scholarship in the field" (p. 338).

In looking at the ways that developmental disabilities are understood in relationship to models of disability, Goodley and Roets (2008) state the task is to challenge not only stereotypical associations of forms of personhood with such impairments, but educational practices that (re)create impairments and associated labels (including special educational needs), and binary distinctions made between people with and without disabilities. These authors argue that impairment that applies to developmental disabilities "must be understood in a way as to deconstruct it in order to reveal its psycho-socio-political nature" and to denote the social, cultural, historical, and political character of impairment associated with developmental disabilities (p. 25).



McClimens (2003) adds that an adequate representation of intellectual disability (in social, academic, political, and economic matters) within current models of disability requires thinking of disability on a continuum so that individual identities are preserved while categorization is reduced.

I note that much of the literature on educating students with IDD focuses on issues related to the nature of school programs and intervention approaches (Browder & Cooper-Duffy, 2003; Browder et al, 2007; Kauffman & Hung, 2009; Kleinert et al., 2009; McGrew & Evans, 2009; Mckenzie & Macleod, 2012), and the inclusion of students in general classrooms (Alqurani & Gut, 2012; Cushing et al., 2009; Downing & Peckham-Hardin, 2007; Hunt & Goetz, 1997; Smith, 1999). McGrew and Evans (2009) suggest that stereotypes of individuals with cognitive disabilities continue to inform many school programs. They refer to the ongoing debate that exists across disciplines about the nature of cognitive disabilities, and oppose the reliance on diagnostic labels and IQ scores to anticipate what students might achieve. They argue that this reliance is the major source of lowered teacher expectations for students with cognitive disabilities. They further claim that the belief that these students should have an alternative set of educational goals from a general curriculum is inconsistent with the empirical data.

### ***Disability Studies / Disability Studies in Education***

An indispensable part of my inquiry is to consider how the IEP process contributes to classifying and sorting students for the purpose of education and the story that is told as a result. I could not, therefore, resist asking what story about IDD resonates most with teachers when it comes to developing IEPs. Given this aim, it was

necessary to consider my research issue in the context of disability studies and disability studies in education. I draw on this literature for two key reasons. Firstly, Baglieri et al. (2011) state that the field of disability studies in education is at the centre of research surrounding questions concerned with answering “What is the nature of disability?” and “What are appropriate educational practices for students with disabilities?” Secondly, a number of authors in DSE critically address issues related to educators’ beliefs and perspectives about disability and to the ways in which educators are socially and culturally primed to see children with disabilities in certain ways within the education system.

#### *Disability Meaning and Perspectives*

I observe that various authors, researchers, and practitioners tend to adopt a definition of disability that supports the viewpoints of their discipline. These viewpoints reflect important differences related to how the causes of disability are understood, how disability is conceptualized overall, and how the classification of children in relation to disability is viewed and used in education. Ware (2001) states that in education, the ‘problematization’ of disability has morphed into the ability/disability binary that is central to the invention of categorical systems that are institutionalized by society and the way we “other” the disabled body.

Mitra (2006) states “there is no consensus on what constitutes disability. There are no commonly accepted ways to define disability and to measure it...At the theoretical level, defining disability is not simply an exercise in semantics...” (p. 236). She suggests that the multitude of perspectives that exist about the definition of

disability may reflect the multifaceted nature of disability. According to Mitra, disability is a limitation in capability or functioning and makes the distinction that when there is a limitation in capability, then there is the potential for disability. When there is a limitation of functioning, then there is an actual disability. She further contends that “an individual is disabled if he or she cannot do or be the things he or she values doing or being” (p. 241). She proposes a three-factor model of disability in which broad factors interact to affect one’s capability to function: personal characteristics such as age and impairment; resources and commodities available; and environment including social and physical barriers. This approach to disability recognizes that impairment can deprive someone of a capability depending on the particular social context and resources available.

Both Gable (2014) and Ware (2001) importantly argue for the need for re-imagining disability in educational practice. Privileging certain viewpoints and discourse about disability within educational institutions can be suggested as due to the pervasive influence of educational psychology through which originated the provision of techniques for organizing, rationalizing, imposing, and administering individual differences (Sugarman, 2014). Through the practices of educational psychologists, Sugarman (2014) states that the space is created for certain aspects and kinds of persons to become objects of concern and targets of intervention:

By interpreting persons as isolated individuals, evoking various performances from them, measuring these performances, subjecting them to quantitative comparisons and evaluations, and ordering them in systems of classification,

educational psychologists have rendered stable and transparent features and kinds of persons....The consequence is that schools have become environments, infused with psychological language, psychological entities, and psychological authority. (p. 64)

As a result, Sugarman argues that students' characteristics and proficiencies are comprehended in psychological terms:

Deviations are set against scientifically derived standards of normality and made troubling yet intelligible to both those afflicted and others charged with their administration" through a rapidly expanding system of diagnostic classification to readily identify and represent a host of children's maladies. (p. 64-65)

Given this argument, he believes that the practices of educational psychologists must be recognized in the ways in which educators understand disability and in what is said about students in terms of who and what they are in the context of schooling. Drawing on his insights, the idea of the IEP can be framed in a number of ways, especially as a well-defined space in which the notion of disability, as being lodged within individual dysfunction, becomes the focus of 'expert' knowledge rooted in psychology and the object of special education intervention.

Internationally, the World Health Organization (WHO) provides a definition of disability through two disability frameworks: The International Classification of Functioning (ICF) and the International Classification and Functioning, Disability and Health – Children and Youth (ICF-CY), (Allan et al., 2006; Majnemer, 2012; WHO, 2001, 2007). "*Disability* is defined as the umbrella term for impairments of Body

Structures and Functions, and for limitations or restrictions of Activities, and restrictions of Participation” (Florian et al., 2006, p.41). Florian et al. (2006) provide an overview of the ICF-CY framework, noting that two levels of understanding are identified to include domains involving interrelated components that act together as either facilitators or barriers to the development of the individual. The framework is designed to “to encompass the body functions and structures, activities, participation, and environments particular to infants, toddlers, children, and adolescents” and provide for documenting the changing nature of the developing child (p. 41): Part 1- *Functioning and Disability*, is concerned with body functions, body structures, and activities and participation. Part 2 - *Contextual Factors*, concerns personal factors, and environmental factors that constitute both facilitators of and barriers to one’s functioning and participation such as available supports and services. Norwich (2014) however, contends that the ICF model requires further development to be applicable to education (see for example, Hollenweger, 2011).

For this study, I draw on the literature that deals with three theoretical models of disability: the medical model of disability (Baglieri et al., 2011; Goodley, 1997; Harris, 2000; Linton, 1998; Taylor, 1996); the social model of disability (Barnes, 1991; Gable, 2014; Gabel & Peters, 2004; Goodley, 2001; Hughes & Paterson, 1997; McClimens, 2003; Oliver, 1990, 1992, 1996, 1997, 2013; Shakespeare & Watson, 1997, 2001; Swain & French, 2000; Terzi, 2004; Thomas, 2004; Tregaskis, 2002; Ware, 2001); and the social-relational model of disability (Florian et al., 2006; Grenier, 2010; McLaughlin et al., 2006; Reindal, 2008a, 2008b, 2009, 2010a; Thomas, 2004). Adopting a disability

studies lens, I identify key tenets of each model that provide the points of reference used for my analysis and interpretation of data related to IDD meaning for IEP development.

*a) The medical model of disability*

The medical model of disability is described as adhering to traditional etiological understandings of disability that view the causes and symptoms of disability as the result of genetic, biological, or medical factors. From this viewpoint, disability, deficits, and learning difficulties are understood in terms of individual impairment due to physical or mental conditions of the organism which prevent or impair function (Goodley, 1997; Harris, 2000). Therefore, individual's circumstances and characteristics (e.g. impairment) are the result of within-the-person factors and conditions of the body. Goodley (1997) describes this as "the dominant *individual or personal tragedy model of learning difficulties*" in which one's impairment is seen as causing a disability, leading to a myriad of disabilities such as disabled learning, disabled interactions with others, and disabled personal relationships (p.368). Within the medical model, social and environmental conditions are not used to explain the cause or reasons for one's disability but instead the focus is on discourses of individual pathology, functional inabilities, deficiencies, and dependency. People are viewed as needing to adjust to their environments and be "the recipients of professional expertise", interventions, and/or care (Goodley, 1997, p. 369).

Baglieri et al. (2011) refer to supporters of this model as *Incrementalists* who assume deficits exist within the individual as something to fix, accommodate, or endure. For *Incrementalists*, scientifically proven interventions are therefore the means through

which deficiencies should be addressed. From this perspective, the purpose of special education is to address students' deficits and deficiencies so they are able to adapt to their environment and the post school world. Within the medical model, disability translates into being "unable to fulfil normal expectations for learning" (Linton, 1998, p. 532). How this view is incorporated into school practices [such as the IEP process] varies depending on educators' beliefs, resources, and sentiment toward students (Grenier, 2010).

*b) The social model of disability*

In contrast to the medical model, the social model shifts the 'problem' of disability away from the individual and within-individual factors as the cause of disability to the collective responsibility of society as a whole (Tregaskis, 2002). The basic tenets of the social model are seen to stem from the work of activists in the United Kingdom during the 1970's who advocated for the rights of people with physical disabilities (Abberley, 1987; Barnes, 1991; Connor et al., 2008; Oliver, 1990, 1996, 2013). Gabel and Peters (2004) state:

[A] hallmark of the social model has been its political standpoint on the relationship of disabled people to society. In general, the social model recognizes two groups in the social struggle – the disabled and the non-disabled – even though the distinction between these two groups is often unclear. (p. 593)

These authors posit that traditionally, proponents of the social model have outright rejected the functionalism of the medical model. While social model theorists recognize the physiological aspects of impairment in terms of physical or bodily dysfunction,

supporters of this model describe disability as socially constructed, due to social responses, social attitudes, and environmental barriers that are disabling (Barnes, 1991; Goodley & Roets, 2008; Goodley & Runswick-Cole, 2010; Grenier, 2010; Oliver, 1996, 2004, 2013; Shakespeare, 2006, 2008; Shakespeare & Watson, 1997, 2001).

Shakespeare and Watson (1997) add that in a social analysis of disability, it is not the effects of one's impairments that disable people but social attitudes, discrimination and prejudice.

Harris (2000) agrees that a social conception of disability adopts the view that the major disabling features of disability are based in social conditions such as social exclusion, human attitudes, and discrimination. Similarly, other authors note the disabling circumstances caused by inequalities due to social, physical, economic, cultural, environmental, and political factors (Barnes, 1991; Goodley, 1997; Oliver, 1996, 1997, 2013). Society is seen as denying people with disabilities equality through a variety of practices that are disempowering, such as classification systems that label people and practices that prevent access to social spaces. Swain and French (2000) and Oliver (1990, 1996, 2013) also point out that the social model challenges views that consider the experience of being impaired as tragic and disability as a personal tragedy, associating such assumptions with the medical model, society's dominant values of normality, and with policies seeking to compensate 'victims' of these 'tragedies'.

Baglieri et al.(2011) identify those who work out of the social model as *Reconceptualists* who believe education's purpose is not only to enhance individual functioning but to focus on changing the social and environmental limitations placed on



students. Baglieri et al. argue for more ethical decision-making by teachers and believe that “the knowledge base in special education is inadequate requiring substantial change” (p. 267-268). Goodley (1997) suggests that the discourses of the social model account for the *sociocultural bases* of learning difficulties, navigating notions of *social problems*, of *societal/ environmental* difficulties and of *independence*. Social model supporters advocate for empowering people with learning difficulties to step out of the passive role assigned to them by society and call for individual and collective responsibility of all members of society to change disabling social and environmental conditions (Oliver, 1990).

*c) The social-relational model of disability*

The social-relational model is described as an integrated model that considers disability to be caused by both one’s biomedical condition and the ways in which a person’s social environment is disabling, restricting and limiting (Gable, 2014; Reindal, 2008a, 2010a; Thomas, 2004). The major tenets of this model rest on the belief that although impairment is a necessary prerequisite condition for reduced function which has personal and social implications for the person, there is an interplay of individual functioning and social conditions or circumstances that together result in disability. Thomas (2004) advocates for a social-relational approach to understanding disability that she acknowledges as being first proposed by Finkelstein and Hunt in the 1970’s. She notes that Finkelstein’s recent criticism is that “the social model literature has not explained what disability is” (p. 572). Therefore a social relational model takes this into consideration and explains disability by drawing on current meanings of disability used

in both disability studies and medical sociology.

Shakespeare and Watson (2001) offer support for this view and propose that people are disabled both by social barriers and by their bodies, stating that disability “sits at the intersection of biology and society...agency and structure” (p. 19). Disability is conceptualized as a complex interaction between individuals and their social contexts, and an interaction of factors between society and the impaired body (Shakespeare, 2006, 2008). Shakespeare and Watson (2001) believe that impairment is social because discourses used to represent impairment are socially and culturally determined. Reindal (2008a) also describes this model as premised on the contingency and interplay between the effects of impairment and the phenomenon of disability as a social relational phenomenon. She states that whether the effects of reduced function become a disability depends on restrictions and conditions within various levels of society. Reindal (2010a) advocates for a social-relational model of disability as a platform for special needs education. She further notes that the social-relational model conforms to the morality of inclusion while retaining the social model’s main concerns of oppression, discrimination, and social and structural barriers.

Runswick-Cole and Hodge (2009) connect thinking about disability models to special practices in education and to defining special needs. While they comment that current policy and practices continue to rely on a medical model of deficits, they note academics in disability studies challenge the focus on individual deficits. Working within the social model of disability, they state that in education, students are disabled through practices such as being labelled as having ‘special needs’ or by segregated

school programs. Other researchers also challenge the use of deficit classification in the provision of educational programs and examine the nature of educational discourses that perpetuate deficit-based practices (Ashton, 2011; Cahill Paugh & Dudley-Marling, 2011; Gable, 2014; Goodley & Runswick-Cole, 2010; Rogers, 2002; Waterhouse, 2004).

My attention to the disability studies literature was not only directed at examining models of disability but importantly to literature concerned with the use of classification systems based on disability constructs and the implications of these systems for the IEP process. I note that several researchers point to the ramifications of classification systems that frame understandings of students and stereotype students according to disability which they in turn argue produce particular educational responses (Florian et al., 2006; Powell, 2006; Slee, 2001; Ware, 2001; Vehmas, 2010). Some authors also argue that classifications based on models of cognition that construct identities of inferiority are used to describe the nature of learning and the competencies of students with cognitive disabilities (Kleinert et al. 2009; McGrew & Evans, 2009). Further, Norwich (2014) suggests that there is a labelling cycle of terms used to describe an area of disability that applies to the use of a term as well as to ideas and assumptions. This process or cycle takes time as terms spread and become more widely adopted. Over time, “the term comes to be used in less precise and increasingly negative ways reflecting negative attitudes to disability...[this cycle] is also relevant to the concept of ‘special educational needs’” (p. 16). In the historical and current social contexts of disability reflected in the literature, ‘atypicality’ (Roulstone, 2012) appears to be a lens

through which disabled identities are constructed. Roulstone (2012) believes this ‘atypicality’ perspective provides the guiding ideas used for describing people with disabilities and for defining the boundaries of their existence physically, socially, educationally, politically, and culturally.

Given the need to examine the prevailing beliefs and assumptions that underpin educators’ views of disability and the special education needs of students, Slee’s (1997, 2001, 2011, 2013) work is particularly enlightening. Slee (1997) argues that discussing theories of disablement is necessary to interrogating disability and special needs education and for challenging underlying assumptions about difference and schooling. He suggests the need to apply sociological perspectives about disability to the analysis of special educational needs and education practices so that exclusions, as mediated through curriculum, pedagogy, and organizational practices [such as the IEP process] can be exposed and inclusive educational cultures generated. His position posits that the reconsideration of the various components of the educational, organizational, and cultural life of schools as they disenfranchise or entitle students with disabilities has practical implications for schools and teachers. Such a reconsideration presses us “to consider how we support and legitimate difference ...rather than fuel a bifurcated [regular and special] educational system” (p.416).

Slee believes that special education practices and policies must be analyzed in relation to disability theories and discourses about the normalization of people with disabilities. His argument lends support to the idea that research into the IEP process must consider how disability categories and normalizing discourses and assumptions are

submerged in this process and how in turn, the identities of students are produced as a result. He (2001) concludes that classification systems define levels of belonging based on individual characteristics. He argues that special education is largely unaware of its pathological gaze and as a result “[t]he special educator emerges as a ‘card carrying designator of disability’” (p.170-171).

Ware (2001) adds that in the field of special education, students are labelled and instructional decisions made based on disability and deficits which control the fate and outcomes of learners. She draws on Bourdieu’s concept of “*symbolic violence*” to define what she sees as the “inherent hostility to disability” existing in education and notes that for Bourdieu, symbolic violence exists when an educational practice involves “telling the child what (s)he is” (p. 52). This connection to Bourdieu is important to my own study in that it supports the need to consider how the IEP process might represent a form of symbolic violence in that this process involves ‘telling students who they are’ as learners with special educational needs who are different from their peers.

Cahill Paugh and Dudley-Marling (2011) conclude that discussions of students and how school environments are organized are dominated by deficit-based discourses focused on what students are unable to do. They argue that because assumptions about students become naturalized, deficit discourses are rendered invisible and resistant to critique, leading to the embedded nature of deficit-based thinking that “continues to proliferate in research and education practice” (p. 820). In keeping with this point, both Ashton (2011) and Slee (2001) discuss the ‘grand narrative’ used in special education that functions to legitimize the beliefs and practices of educators which impact on how

educators' view students as learners, and may influence the curriculum taught, instructional practices, and assessment of students' competencies and progress. Florian et al. (2006) propose that further research is necessary "to move beyond discrete categorical classification systems" that do not recognize the complexity of human differences, unnecessarily stigmatize children, and "do not always benefit individuals who are classified" (p. 36).

Teachers and other stakeholders in the education of children demonstrate themselves as moral subjects who care about all students and view the situation from a caring, "helping" model that presumes disability to be a problem to be solved" (Holmes, 2012, p. 164) by appropriate interventions, learning goals, and resources that get documented by the IEP. Holmes (2012) describes the necessity of a critical disability view that addresses questions about who gets to represent disability and according to whose terms without the focus on trying to "fix it", render it "normal", or to "restore" functioning to levels considered typical for humans.

The DS/DSE literature addressed provides an overview of existing disability perspectives, issues and tensions that can be considered to influence educational practices and public engagement with disability in Ontario and elsewhere. It is important, however, to point out the recent work of other authors concerned with the impacts of neoliberalism on disability meaning and special education. Within a neoliberal policy and curriculum context that distinguishes the abled from the nonabled, there may be "ground breaking consequences for practice" in special education (Stangvik, 2014, p. 91). Stangvik (2014) acknowledges that traditionally, special

education is based on a concept of disability as an individual condition that needs to be diagnosed and sorted into categories. He notes that according to the research, a medical and categorical perspective of disability still is the most dominant perspective. This perspective individualizes disability and creates a particular mindset and discourse that influences professionals, their education models, and policies. At the same time, Stangvik (2014) indicates that neoliberal policies are creating a new context for education and a new frame of mind that controls how schools respond to students with disability and special education needs. He notes the implication for special education is that new views on disabilities and the management of disabilities are being created. These views focus on the societal context of disability and show “a move away from a one-sided psycho-medical view to a holistic view on disability that takes into account social interactions, the character of systems as well as macro-social factors in the definition” (p. 91; see also Stangvik, 2010, p. 355).

### ***Special Educational Needs Literature***

My focus on the literature addressing special educational needs is largely directed at scholarly work concerned with the philosophical debate about the meaning of special needs related to disability and education practices and to how the concept of a special educational need should be interpreted. An abundance of empirical research literature (Skidmore, 1996) focuses on specific programming interventions related to students' special educational needs while less attention seems directed at issues dealing with how educators actually conceptualize and come to understand the meaning of a special educational need. Given my review of the literature, it appears that a great deal

of North American scholarship concerns special educational needs in relationship to studies on research-based interventions. Literature addressing a conceptual explanation and interpretation of special needs in education was primarily accessed through works published in international academic journals such as the “*International Journal of Inclusive Education*”, the “*Journal of Research in Special Needs Education*”, the “*British Journal of Special Education*”, and the “*European Journal of Special Needs Education*”. These academic publications provided more relevant conceptual pieces related to debates and issues in the conceptualization of special needs in relationship to individuals with disabilities and educational provision.

To contextualize special needs thinking in education, Nes and Stromstad (2006) propose that the right to special needs education was maintained in order to secure access to professional teaching programs for the most vulnerable students. However they argue that the discourse of rights has failed to challenge the politics of needs and exclusion. Slee (2001) adds that shortcomings exist in the research which “when turning to questions of the intersection of disablement and education...some work is necessary to clarify its informing principles” and “to reconsider the *politics of special educational needs*” (p. 171).

Based on a review of government policy, it appears that in the United States, the notion of special educational needs became a crucial aspect of education law in 1975, while in Ontario, the concept of special education need became an important notion in special education legislation with the introduction of Bill 82 in 1980. The definition of special educational needs used in legislation in the UK [and North America] appears



premised on a category-based system for conceptualizing special needs and for providing programs to meet those needs (Farrell, 2001; Runswick-Cole & Hodge, 2009). Norwich (2014) notes that the concept of special educational needs was introduced in England in the 1970's. It was meant as "a positive focus on individually needed provision and opportunities [and] promised the end of deficit categories and a learner-centered focus on personal difficulties" (p. 16). Provision was interpreted as being about the integration of pupils with disabilities in ordinary schools. Norwich notes that over time, special educational needs came to be seen as general deficits with negative associations.

An abundance of the literature indicates this perspective on special educational needs, referring to students' individual deficits and problems in learning. Runswick-Cole and Hodge (2009) point out that the language of special educational needs focuses on individual children's difficulties, deficits, and within-child factors (such as in the medical model of disability), rather than on social and environmental barriers to children's learning (the social model of disability). They refer to Rorty (1989) who comments that the term special educational needs can be seen to contribute to the exclusion of children so labelled as they are othered by professionals and, in turn, by children who see these students as different and deficient. Runswick-Cole and Hodge add that special needs terminology masks a practice of stratification that continues to determine children's educational paths by assigning to them an identity defined by an administrative label. They argue that it is time to challenge deficit discourses used to define special educational needs and to consider rejecting the term special needs as

outdated and exclusionary.

Farrell (2001) agrees that defining special educational needs according to deficit categories focuses on within-the-child problems and ignores the complexity of interrelated factors such as teaching and management strategies that are external to the child. In addition, Farrell suggests that defining needs in terms of within-child deficits leads to lower achievement expectations, reinforces the idea that particular disabilities require exclusive interventions, and implies that the student will always have the problem given that labels 'tend to stick'. In writing about special educational needs and access to equitable educational opportunity and attainment, Powell (2006) states that school gate-keepers, such as teachers, school administrators, and school psychologists, apply special educational needs categories at an individual level to imply deviance from social norms. Although categories are continuously revised, Powell states "the processes of classification in schools, once implemented, resist change – as do the organizations established to serve classified students..." (p. 580).

Some authors note the term special educational need is used in a few countries, such as Germany, to delineate levels of support required by a student (Powell, 2006). Others state the term is used in reference to individual educational rights emphasizing children's strengths and the value of all students such as in Italy (Runswick-Cole & Hodge, 2009). Norwich (2002, 2008, 2014) identifies dilemmas of difference as a means to understanding special needs in education. He points out that these dilemmas are the result of how difference should be taken into account – whether to recognize differences as relevant to the provision of programs to address individual needs, or whether to offer

a common provision for all students with the risk of not providing what is relevant to students' individual needs. The work of Norwich and Lewis (2007) identifies three broad kinds of needs that they conceptualize as educational and pedagogical: (a) needs that are shared by all learners, (b) needs specific to every individual, and, (c) needs specific to certain disability groups. Norwich and Lewis argue that good teaching takes into account the needs shared by all students as well as needs specific to the individual student.

An especially insightful work is Vehmas's (2010) philosophical analysis of special needs as a central concept in special education. Noting that little attention in the literature has been given to satisfactorily defining the term special need, he concludes that the focus has instead been on the recognition of certain features of individuals that are seen as special needs. Based on this argument, he critically questions what needs are and on what grounds they are defined as "special" or "exceptional". Wilson (2002) shares this position and states the term special needs is used in special education practice as a kind of specialized term that "creates the impression that we already know what we are talking about. But in fact it is nowhere clearly defined...its semi-technical use obscures rather than clarifies its meaning" (p. 62). Both of these scholars support the idea that the seminal question "what is meant by a special need" has yet to be answered.

Vehmas (2010) describes the individualized approach in special education as having a rational and benevolent origin. He claims this approach relies on the examination of the assumed characteristics of groups of people and on meeting their needs that are explained by individual features. Therefore, he argues that special

education is about identifying categories of special educational needs and relating special curricula to them. Vehmas further suggests that special education moves in cycles of moral and political legitimatisation. Part of this process is the renewal of terminology used to depict individuals, their individual characteristics, and “to categorise and sort their needs between ordinary and special” (p. 87). He proposes that distinguishing between ordinary and special needs in education is a matter of making normative value judgements of what is good and valuable for students, for people and for society. Vehmas further argues that special needs rhetoric has serious shortcomings because the term special is an ambiguous one. He concludes that in special education, special often refers to undesirable characteristics or ways of functioning in relation to an ability or activity that is considered important or necessary. Therefore he adopts the viewpoint that there is a moral weight that defines needs since the significance of needs is related to prevailing social norms and cultural context. Importantly, Vehmas expresses that individual characteristics viewed as problematic in education cannot be understood without considering the interaction of the individual in his/her environment and in terms of social arrangements, which can be considered as reflecting the social-relational view of disability discussed earlier. Furthermore, he questions whether or not the practice of categorizing needs into ordinary and special is another way of marginalizing or oppressing certain people, and suggests that the focus on individualization in special education has the potential for the social exclusion of or discrimination against those considered as special or exceptional.

### ***The Individual Education Plan (IEP)***

I begin addressing the literatures on the IEP by noting that it is typically described as a key document and core component of policy and practice for educating students with special educational needs in many countries such as Canada, Australia, New Zealand, the United States, Ireland, the United Kingdom (UK), and various countries in Europe and Scandinavia ( McCausland, 2005; McLaughlin, 2010; Mitchell, Morton, & Hornby, 2010; Pawley & Tennant, 2008; Riddell et al., 2006; Rose et al., 2010; Ruskus & Gerulaitis, 2009/10; Skrtic, 1991, 1995, 2005; Sopko, 2003). Despite the various terms used in different countries to refer to the IEP, a common description is that it is “the backbone”, “the core”, “a key element”, and “the heart and soul” of special education (Bateman & Linden, 1998; Brigham et al., 2009; Mitchell et al., 2010).

#### *a) IEP Purpose and Requirements*

Overall, there appears to be little debate in the literature about the purpose of the IEP for designing and implementing individualized educational programs for students with special education needs who require some form of specialized education or support. A substantial amount of the literature contextualizes the IEP process by identifying its historical and sociopolitical underpinnings within the context of civil rights initiatives in the United States and subsequent democratic educational legislation in the latter half of the 20<sup>th</sup> century, such as the Education of All Handicapped Children Act of 1975 (EAHCA; PUB.L. No. 94-142) that addressed educational equity and access to a free, public education for all students regardless of circumstances, need or disability (McLaughlin, 2010; Sopko, 2003). Andreasson et al. (2013) suggest, along

with several other authors, that the use of the IEP can be historically linked to the ideological thinking and goals of school systems that emphasized democratic and egalitarian aspects in educating every student regardless of disability, severity of needs, and psychological or medical diagnosis (Christle & Yell, 2010; Drasgow, Yell, & Robinson, 2001; Etscheidt, 2003, 2006; Etscheidt & Curran, 2010; Gabel, 2008; Gabel & Connor, 2009; Millward et al., 2002; Mitchell, Morton & Hornby, 2010; Rose et. al., 2010; Skrtic, 1991; Sopko, 2003; Tisdall & Riddell, 2006; Yell & Stecker, 2003).

McLaughlin (2010) notes that EAHCA legislation in 1975 was also grounded in the disability rights movement during the 1970's that sought to attain equality of opportunity which encompassed individualization, integration, inclusion, full participation, independent living, and economic self-sufficiency. As interpreted in the Individuals With Disabilities Education Improvement Act (IDEA 1997, 2004), such goals are reflected in the provisions that govern the IEP process. Procedural requirements associated with the IEP are to ensure that each student "is treated justly" (McLaughlin, 2010, p. 269). Other requirements stipulate that there be educational benefit for the student (McLaughlin, 2010; Yell & Stecker, 2003). Sopko (2003) adds that the requirements directing the IEP development and revision process in the United States are intended to ensure students with a disability receive a free and appropriate public education alongside their peers to the maximum extent possible.

In a synthesis of the IEP literature focused on American studies between 1997 and 2003, Sopko (2003) describes the research on the IEP as limited and scattered. However, certain aspects of the IEP process are noted. He reports that in the United

States, the IEP is “a fluid document that must be adjusted according to a student’s needs” (p. 4) and notes that IEP development is through a team meeting process that is intended to bring together educators, parents, the student, and other professionals. Recent literature indicates that because of inclusive education initiatives, in some countries the focus “has shifted to the development of the IEP for implementation in regular classrooms” (Mitchell, Morton, & Hornby, 2010, p. iii). In the United States, for example, the IEP is no longer regarded as the exclusive responsibility of special educators but instead its development and implementation is now directed at a student’s success within the general education classroom (Lee-Tarver, 2006; Rosas et al., 2009). While in Ontario, the IEP is similarly seen as not the sole responsibility of the special educator but of all teachers, the shift in focus on the development and implementation of the IEP for student participation in regular classroom learning has yet to be made.

Since educational policies in the United States (the Education for All Handicapped Children Act, 1975 (Public Law 94-142); Individuals with Disabilities Education Act, 1997 (IDEA); No Child Left Behind Act, 2001; Individuals with Disabilities Education Improvement Act, 2004 (IDEIA)) established the requirements for an appropriate public education through an individualized education program for students with disabilities, the literature indicates that meeting the legal requirements of the IEP process (Drasgow et al., 2001; Patterson, 2005; Yell & Stecker, 2003) was a focus of concern for educators and researchers. By contrast, McLaughlin & Jordan (2005) point out that in Canada there is not the same legal force attached to the IEP which I suggest may account somewhat for the paucity of Canadian research in this

area. Drasgow et al. (2001) conclude:

[P]rocedural requirements provide the structure and process that compels both schools and parents to adhere to a single set of well-specified rules when designing a student's program...The substantive requirements of the IEP ensure that a student receives meaningful educational benefit. Schools are on solid ground when they design programs that are beneficial and when they collect objective data to document progress. Finally IEPs should be based on research-supported educational programs of proven effectiveness in educating students with disabilities. (p. 372-373)

Given this educational climate, much of the research literature from the United States addresses procedural issues related to the IEP, particularly in terms of compliance to specific requirements outlined in educational laws and policies (Browder & Cooper-Duffy, 2003; Browder et al., 2004; Drasgow et al., 2001; Lynch & Adams, 2008; McLaughlin & Jordan, 2005; Menlove et al., 2001; Patterson, 2005; Perner, 2007; Salend, 2008; Sullivan, 2003; Todd, 1999; Yell & Stecker, 2003; Van Dyke et al., 2006).

I pause to note, however, that to understand the IEP literature for situating my own research goes beyond studies that concern procedural technicalities of the IEP process and professional compliance to these technicalities in practice. My review also considers the complexity of issues relevant to IEP development processes, including works that speak to the ways in which the IEP is representative of traditional special education thinking, that address issues of decision making, collaboration, and curricula



content, the usefulness of the IEP to everyday teaching and learning, and the ways that IEP processes, as an example of dominant cultural norms and practices rooted within the principle of normalization (Mitchell, Morton, & Hornby, 2010) are privileged and built into western education systems.

In light of the literature, I argue that a central conception of the IEP process appears to be that it is instrumental to the sorting, categorizing and positioning of certain students within the school system based on disability and the language of special education needs. Sugarman (2014) points out that schooling is never an impartial instrument in human development and states, “children are understood and administered according to varying institutional purposes and practices [such as the IEP process], and come to...act in institutionally prescribed ways” (p. 53). Seen from this perspective, he notes that education is focused on preparing people who are able to and will do certain things that society requires. Therefore education’s concern is ‘people making’. I used these insights to consider literature that fit with questions concerning the power of the IEP process for academically and socially constructing the identities of students with disabilities to position them on the educational landscape.

While little government emphasis has been placed on research into the IEP within Ontario’s education system or by other provincial governments in Canada, the literature indicates a fair amount of national support given to projects looking into the IEP process for informing policy and practice in other countries such as Australia, England, New Zealand, Ireland, Scotland, the United States, and Sweden. One response to such an initiative in New Zealand is the report by Mitchell, Morton, and Hornby

(2010). These authors take an in-depth look at the IEP literature to provide an astute review of research works that address developments and issues related to IEP processes and effective practices in various countries including in Canada. In their work *Review of the Literature on Individual Education Plans: Report to the New Zealand Ministry of Education* (May 2010), they offer a comprehensive account of the literature taken predominantly from sources published after 2000. Particular attention is given to IEP processes, special education assessment practice, and the use of the IEP in school-based practice.

In their analysis of the IEP literature, Mitchell, Morton, and Hornby identified four major themes that emerged to classify the works reviewed: (1) origins, purposes and critiques of IEPs, (2) collaboration and partnerships in IEP processes, (3) educational outcomes, curriculum and IEPs, and, (4) monitoring and assessment practices and IEPs. Within the first theme concerned with the origin, purpose, and critique of the IEP, they conclude that although IEPs are common across countries in the provision of special education, “IEPs suffer from having multiple purposes ascribed to them [in that] the same IEP document frequently [is] being expected to serve educational, legal, planning, accountability, placement, and resource allocation purposes”; therefore the challenge is ensuring that the IEP serves these roles without distorting its primacy as an educational planning document (p. 18).

Shaddock et al. (2009) offer a similar argument and state that IEPs “tend to serve multiple roles” which they suggest is part of the problem with the IEP (p. 69). Millward et al. (2002) state that in the UK, IEPs have become a mechanism for ensuring

educational accountability within special needs education in that IEP objectives have become a means to measure students' achievement of standards and the effectiveness and performance of special education as a system. Other authors add that IEPs are seen by teachers as an administrative task rather than a tool for planning effective instruction and learning, as a document to access additional resources and secure increased funding, and as a means to place students with special education needs outside of testing regimes in order to reduce any potential negative impact on a school's performance profile (Mitchell, Morton, & Hornby, 2010; Tarver, 2004).

*b) Collaboration and Participation of Others*

The theme of collaboration in the IEP process discussed by Mitchell, Morton, and Hornby (2010) describes the challenges faced by teachers and parents in establishing and maintaining partnerships for developing IEPs. Based on their report, these challenges are seen as related to issues of (a) equity, reciprocity, and power, (b) cultural diversity, (c) participation levels, roles and responsibilities of teachers, parents, students, and support people, and, (d) overcoming barriers to collaboration. An additional observation made by Murray (2000) is that the meaning of collaboration and partnership in planning individualized programs is unclear and is used in a variety of ways so that "it now carries little real meaning" (p. 695). Furthermore, it is the point that the parent-professional partnership has different meanings for parents and for professionals and tends to change according to contexts.

The review of the literature shows that parent and student participation in the IEP process continues to be problematic. Research prior to 1997 indicates that parents

often felt uninvolved in IEP meetings, viewing their role as ‘consent givers’ in the process (Rock, 2000) and teachers as the educational decision makers. Sopko (2003) notes that more recent studies indicate that parents’ sentiments about their involvement in IEP development meetings have remained largely unchanged. At the same time, Sopko reports on survey data collected in 2001 by the U.S. Department of Education that indicates most parents believe their child’s IEP goals are appropriate, are satisfied with their amount of involvement in IEP decision making, and view the services and supports in the IEP as being very individualized for their child.

Contradicting these findings is a variety of literature on parent collaboration and input that show parents are not often satisfied with their participation in IEP meetings and that collaboration with parents varies. Although the IEP process is described as a means for engaging parents in the education of their child and for fostering a sense of equal cooperation between professionals and parents in planning individualized programs, research consistently shows varying and limited levels of collaboration in IEP development between IEP team members, teachers, parents, and students (Barnard-Brak & Lichtenberger, 2010; Clark, 2000; Fish, 2008; Garriott et al. 2000; Kane et al., 2003; Kurth & Mastergeorge, 2010; Martin et al., 2004, 2006a, 2006b; Mason et al., 2004; Pearson, 2000; Rehfeldt et al., 2012; Rock, 2000; Rodgers, 1995; Strogilos & Xanthacou, 2006; Stoner et al., 2005; Van Scliver & Conover, 2009).

Based on their UK study, Strogilos and Xanthacou (2006) report that the common pattern is for teachers to write IEPs using reports from other professionals such as therapists who work with students but in actual practice, teachers do not ask for direct

input from either other professionals or from parents. These researchers illustrate that decisions about IEP goals are not based on a process of collaboration and reaching mutual agreement. At the same time, they observe that teachers and therapists believe their goals for students overlap.

Davis (2008) contends that although teachers are the most knowledgeable resource in programming for students' needs, the quality of the teacher's relationship with parents and community agencies has a major impact on the overall outcomes for students. In a similar vein, Pearson's (2000) study in the UK shows that context and school culture have significant effects on IEP practices and importantly influence the nature and level of collaboration between teachers, parents, students, and other stakeholders when developing and implementing IEPs.

In an Australian study, Beamish et al. (2012) found that while most educators in the study agree that parent and interagency collaboration are quality indicators of special education planning, wide variation exists in the actual implementation of collaborative practices. They report that despite seeing parent attendance at planning meetings as being vital, educators are generally reticent about empowering parents to make educational decisions for their children. Similarly, Stroggilos and Xanthacou (2006) conclude that the IEP is not used as a tool for collaboration between home and school, stating that in most cases, parents may be asked by educators to offer an opinion but generally accept their child's IEP as written without making any proposals. As with other studies (Frankl, 2005; Stroggilos & Xanthacou, 2006), Rehfeldt et al. (2012) note that while schools suggest parents should be involved in the IEP development process,

parents are generally consulted or asked for feedback in isolation from actual meetings conducted by professionals. The literature cited indicates that in practice, collaboration is limited to teachers informing parents about the child's IEP and inviting input after its development.

The literature on students' involvement in their own IEP meetings suggests that students typically have limited participation and input in the IEP process. A number of authors argue the importance and ability of students with varying disabilities, including students with significant cognitive disabilities, to be involved in developing their IEPs (Shriner, 2000; Test et al., 2004; Thomson et al., 2002). For example, Rehfeldt et al. (2012) show that students with varying disabilities, including students with intellectual disabilities, can be actively involved in the IEP process in some way. Yet, a substantial body of research presents a more negative view of student participation in the IEP process. Other findings relate to the low levels of student involvement in their own IEPs whether or not the student expresses interest in participating and is in attendance during IEP meetings (Martin et al., 2004, 2006; Pawley & Tennant, 2008; Van Dyke et al., 2006; Zickel & Arnold, 2001). It appears that despite the educational discourse that speaks to the meaningful involvement of parents, students, and others in the IEP process, there is a gap between the reality of collaborative practice and active parental participation and the rhetoric of policy and educators.

*c) Challenges and Barriers to IEP Collaboration*

Research suggests that parents continue to express difficulties and logistical issues such as time constraints and accessibility factors, language barriers, cultural

insensitivity, and feelings of inferiority when it comes to their involvement in the IEP development process (Sopko, 2003). These findings are reported in current research into parent collaboration in the IEP process and educators' perceptions of their role in developing IEPs (Ambrukaitis & Ruskus, 2002; Carter, 2009; Kane et al., 2003; Luder et al., 2011; Ruskus & Gerulaitis, 2009/10; Shaddock et al., 2009; Stroggilos & Xanthacou, 2006; Yssel et al., 2007; Zhang & Bennett, 2003). As observed by some authors (Dabkowski, 2004; Rock, 2000; Sopko, 2003; Taylor, 2001) challenges in establishing and maintaining parental collaboration in the IEP process include logistical difficulties in scheduling meetings, time constraints of teachers and parents, accessing child care, the availability of support professionals, excessive paperwork, unrealistic goal-setting (Rodger et al, 1999), misunderstandings about the purposes of the IEP, inadequate teamwork (Callicott, 2003; Davis, 2008; Mitchell, 2008), and lack of training and planning for what is involved (Alberta Teachers' Federation, 2009; Rosas et al., 2009).

Various barriers to parent involvement in the IEP process have been described as revolving around (a) parent and family factors including parents' beliefs and perceptions about their involvement, and the influence of class, ethnicity, and gender, (b) factors related to the child such as age, disability, and behavioural problems, (c) parent-teacher factors related to differing agendas, attitudes, terminology and language used by teachers and parents, and, (d) societal factors that include demographic and economic issues (Mitchell, Morton, & Hornby, 2010).

In Sopko's (2003) view, specific barriers exist around the IEP development

process that concern teachers' skills, training, and lack of time, the increase in responsibilities placed on educators, challenges teachers' face in addressing the individual needs of each child, educators' different perceptions about curriculum adaptability in relation to accessing the general curriculum, different interpretations of inclusion, and teachers' roles and skills in facilitating the participation of others including students in the process. Sopko calls for more studies on the decision making process for all components of the IEP including the impact of the IEP's required components on the decisions made about the IEP for a student, on parent involvement, and on the effects of professional development and training related to the IEP process, goal development, and facilitating the involvement of other people.

A school-dominated relationship is seen as natural with teachers in a position of power and as experts in the education of the child with parents and students having limited influence on the IEP process (Carter, 2009; Garriott et al., 2000; Lytle & Bordin, 2001; Martin et al., 2004; Pruitt et al., 1998; Rock, 2000; Rodger et al., 1999; Ruskus & Gerulaitis, 2009/10; Seligman, 2000; Simon, 2006; Stephenson, 1996; Stoner et al., 2005; Stroggilos & Xanthacou, 2006; Taylor, 2001; Ware, 1999). Miles-Bonart (2001) notes that a common area of disagreement for parents is with the category of disability assigned to their children.

In a similar vein, Ambrukaitis & Ruskus (2002) found that teachers often see the interest and expectations of parents as unrealistic or ill-informed. Based on their study of parental involvement in the individual education planning for their children with cognitive disabilities, Ruskus and Gerulaitis (2009/10) conclude that the involvement of



parents is constrained by “limits rooted in the complexity of the relationship” between educators and parents (p. 28). They observe that the discourse of the school is active while that of parents remains silent. These authors stress that to improve individual education planning, a new culture of negotiation, the equal participation of parents, teachers, and students is required, as well as adopting a strengths-based perspective toward the child. They suggest that the IEP must be seen as a tool for parents’ social participation and involvement in their child’s education in actual practice.

Additional literature points to challenges related to the disjunction between the dominant culture of schools and the cultural and linguistic diversity of families (Callicott, 2003; Thorp, 1997; Trainor, 2010; Zhang & Bennett, 2003). Mitchell, Morton and Hornby (2010) cite studies (for example, Kalyanpur et al., 1997) that describe these issues as stemming from differences in beliefs about disability, cultural assumptions about normalization and individualism, and the need to examine the dominant or privileged cultural assumptions and values embedded in the professional practices and frames of reference of schools such as in the IEP process and those of families from culturally diverse backgrounds (Kalyanpur et al., 1997).

*d) Perceptions and Usefulness of the IEP*

A number of studies have investigated teachers’ perceptions of IEPs. What the literature shows is that teachers vary in their opinions and views on the IEP process. Some authors report that teachers find the IEP process important and helpful in their teaching of students with disabilities while other teachers view the IEP process as an administrative task rather than a tool for effective instruction and learning (Rodger et al.,

1999; Lee-Tarver, 2006; Simon, 2006). Other studies show that teachers express low levels of satisfaction with the IEP process, especially regular classroom teachers (Menlove et al., 2001; Rosas et al., 2009). Menlove et al. (2001) found in their study on IEP team members that regular classroom teachers often feel frustrated with the lack of preparation for IEP meetings, with the time demands placed on them, and with the lack of involvement of students in the process. Moreover, they report that regular teachers express doubts about the relevance of the IEP citing issues related to unrealistic goal setting and accountability for student achievement.

*e) IEP Content and Individualized Programs*

A review of works addressing IEP content and curricular goals suggests educators' limited use of input from other professionals such as therapists when identifying and writing IEP goals (Beamish et al., 2012; Strogilos & Xanthacou, 2006), and the varying extent of the actual individualization of IEPs for student attainment of goals (Brigham et al., 2009; Capizzi, 2008; Fuchs & Fuchs, 1998; Kurth & Mastergeorge, 2010). Yell and Stecker (2003) take a long look at IEPs and conclude that they have been fraught with legal and educational problems ever since they became the cornerstone of special education provision in the United States in 1975. Their work notes, as does that of other authors, that IEPs are often not educationally meaningful nor seen as useful for the purpose of daily instruction, that IEP goals are often not measurable, truly individualized nor based on relevant student assessment data (Beamish et al., 2012; Brigham et al., 2009; Drasgow et al., 2001; Hessler & Konrad, 2008; Lee-Tarver, 2006; Strogilos & Xanthacou, 2006; VanScriver & Conover, 2009).

Yell and Stecker (2003) conclude that the IEP “becomes a procedural compliance exercise with little or no relevance to the teaching and learning process” (p. 74).

Browder et al. (2004) take an in-depth look at the IEP and curriculum content in their analysis of what constitutes an appropriate curriculum for students with significant disabilities. These authors acknowledge how different approaches to individualizing school programs have evolved, noting the focus on the *developmental model* in the United States following the enactment of PL94-142 in 1975. Working with this approach, they state that educators assume programs should be based on infant and early childhood curricula according to the mental age of students. Subsequent to this model is the *functional model* that focuses on age-appropriate functional skills in the IEP to address what students require to adapt and function in daily life. Finally, Browder et al. note that the recent *additive model* promotes the participation of students with disabilities in the general curriculum and inclusion in regular classrooms. This approach is seen as reflecting current education policies and initiatives emphasizing the opportunity for all students with disabilities to participate and progress in the general curriculum. In reference to American education law, Pugach and Warger (2001) state:

Although the law still maintains the right of each student with disabilities to an individually referenced curriculum, outcomes linked to the general education program have become the optimal target. It is no longer enough for students with disabilities to be present in general education classrooms. (p. 194)

Other studies into IEP curricula show that although policy efforts are aimed at ensuring access to the general curriculum, little consideration is given to regular curriculum

content by teachers for many students with special education needs. This is shown to be the case in countries where separate or alternative curricula are the focus of students' individualized programs (Riddell et al., 2006).

However, Fisher and Frey (2001) report on a study in which students with significant disabilities across several regular classrooms were able to "access the core curriculum with appropriate accommodations and modifications" (p. 155). At the same time these authors suggest there is a disconnect between the IEP and curriculum and instruction for these students. Some research evidence suggests a shift away from curricula focused on functional skills for students with significant disabilities to IEPs that include more academic objectives and participation in the general curriculum (Karnoven & Huynh, 2007).

A study in the U.S. by Jorgensen et al. (2007) examines how educators' judgements and assumptions about the competence of students with intellectual /developmental disabilities impact on IEP goals and specific features in students' IEPs. Following a ten month period of professional development to enhance educators' views and judgements about the competence of students to learn the general curriculum, these researchers state that IEPs were found to include more general grade-level curriculum objectives, reflected a view of students as competent to learn grade-level curriculum, and demonstrated a shift in focus from alternative curricula and non-academic goals to goals and objectives related to learning the regular curriculum. These researchers suggest that educators who view the label intellectual disability as a social construct, created from culturally bound assumptions, "may be more likely to presume competence

and support students' full membership, participation, and learning within the GE classroom [general classroom]...they may look for and expect to find competence" (p. 251).

Kurth and Mastergeorge (2010) investigated the individual educational programs of students with autism between the ages of 12 and 16 years in both inclusion (general education) and non-inclusion (segregated special education) classrooms. Attention was given to the nature of IEP goals, revisions and progress monitoring of IEP goals, and the differences in IEP content according to classroom placement. They report that IEP team members rely on judgment and experience rather than on empirical evidence and progress monitoring when developing IEP programs. They observe that most IEP goals and services target the core symptoms and deficits associated with autism such as in the areas of communication, social skills, and behaviour.

An additional observation was that although academic goals in IEPs focused equally on reading, writing, and math skills, there were significant differences in the types of goals within these academic areas based on placement. They conclude that regardless of age or level of cognitive, behaviour, and adaptive functioning, students in inclusion settings are more likely to have IEP goals addressing applied skills associated with the core curriculum in math, language arts, and higher order thinking skills. In non-inclusion classrooms, IEP goals were found to focus on rote and procedural skills. Kurth and Mastergeorge (2010) also found that while relevance of IEP goals and quality of instruction are significant factors for students' overall progress, a higher number of IEP goals does not equate with increased student success. In addition they note that despite a

lack in teachers' abilities to monitor and report on student progress in IEP goal attainment, teachers in inclusive settings report on IEP progress more often than teachers in non-inclusive classrooms.

In sum, findings from this study indicate that students in inclusive classroom settings (1) have more general curriculum reading, writing, and math goals in their IEPs, (2) participate in more activities requiring knowledge application, higher order thinking skills, and problem-solving skills, (3) have IEPs that include more adaptations and accommodations to enable participation in the general curriculum, (4) have less repetition of IEP goals over time, and, (5) have more IEP goals focused on reading comprehension compared to the frequent repetition of word analysis goals for students in non-inclusion classrooms. However, these researchers suggest that more work is necessary to investigate the basis for IEP decisions, and the impact of student placement, age, and disability diagnosis on IEP content.

Andreasson et al. (2013) suggest that ideas about pupils with disabilities, their needs, and the rhetoric concerning their development, formulate IEP texts that are permeated by a control mentality, the purpose of which is to systematically describe truths that "are made amenable to interventions...This discourse is based on a number of preconceptions and held truths from which difficulties in school are constructed (cf. Foucault, 1991)" (p. 419). The content of the IEP as a document thus reveals the underlying intentions of the school institution that produces them. There is an additional dimension in the literature that speaks to the IEP process as an educational activity that may lock schools into a continual consideration of individual needs to the detriment of

the development of whole school responses to students' needs in learning (Slee, 1998). Pearson (2000) furthers this idea by proposing that "[t]oo great an emphasis on staff responses to individual needs, however, may result in the marginalisation of students" (p. 146).

*f) IEPs and Assessment*

Considerable variation in the nature, quality, and details of IEPs across schools in the UK was found by McNicholas (2000) in a study on teachers' use of assessment information for developing IEPs for students with profound disabilities. Additional findings indicate that IEPs were not often linked to daily lesson plans and that teachers tend to rely on their own observations of students as starting points for IEP development rather than on assessment data. These concerns reflect a dominant issue reported in the research concerning the degree to which educators develop IEPs based on relevant data about the student (Brigham et al., 2009; Capizzi, 2008; McNicholas, 2000). According to Capizzi (2008), IEPs "are often vague and unfocused, making them difficult to use in guiding instructional planning"; Capizzi notes that research on the IEP has found a weak relationship between IEPs and student assessment information (p.18-19). Importantly, Brigham et al. (2009) conclude that with respect to writing meaningful IEPs that focus on detailed curricular goals for students and how students will fulfill the requirements of the educational program, "there is little empirical evidence that shows educators currently know how to do so" (p. 216).

Additional literature also points out the increasing role that the IEP has in assessment and reporting on student progress. In light of the current emphasis on

standards of achievement and “high stakes” assessments, some researchers are directing their attention to the implications of performance measures, testing and assessment practices, the relationship of the IEP to these practices, and their effects on inclusive education (Browder et al., 2003, 2004; Ketterlin-Geller et al., 2007; Karnoven & Huynh, 2007; Lazarus et al., 2010; McLaughlin & Jordan, 2005; Salend, 2008; Slee, 2005).

*g) Prevailing Issues and Criticisms*

In reflecting on their analysis of the IEP literature, Mitchell, Morton, and Hornby (2010) identify three main areas of criticism underpinning IEP processes. Firstly are criticisms directed at the influence of behavioural psychology and the adherence to behavioural principles that reduce learning to particular components, steps and tasks. Millward et al. (2002) note that such a reductionist approach to the IEP process is not helpful to supporting the principles of inclusive education. Secondly, some authors criticize the over-emphasis on the individual, stating that this approach seems incompatible with school-based curriculum, inclusive education practice, and the actual ways in which teaching and learning take place in schools (Shaddock, 2002). A final area of criticism concerns the lack of research evidence on the effectiveness of IEPs for improving student outcomes despite the accepted logic and purpose of the IEP (Riddell et al., 2002; Shaddock et al., 2009). The issue of the efficacy of IEPs remains a major area for study.

In their analysis, Mitchell, Morton, and Hornby (2010) summarize the following points. Firstly, they state that it is clear that IEPs provide a significant window on special education and education practices in general. For example, these authors note



that IEPs raise important issues to do with inclusive education, curriculum, equity, power, culture, the rights and place of individuals in society, legislation, collaboration between educators, families, and others, pedagogy, and assessment and accountability in learning. Secondly, they conclude that IEPs should lead to reforming school systems to better accommodate student diversity, rather than as a means “to fit the student with special education needs into existing systems” (p. 64). A third point is that future policies on the IEP must be evidence-driven and data-based. An additional comment speaks to how collaboration between schools and families can be compromised when IEPs play a variety of roles, from determining access to services and resources, assessment for learning, and for emphasizing students’ needs. The need for student participation in their own IEPs is further noted as important to setting goals for learning. Finally, in examining the role of IEPs, they argue that the IEP should ultimately lead to a high standard of education that is reflected in improved educational outcomes and quality of life for the student with special educational needs. This last point reiterates the need for research that investigates the efficacy and effectiveness of the IEP process not only in the short-term but in the long-term for students with disabilities.

Overall, the IEP literature produces specific understandings: (1) IEPs are common in special education provision across school systems internationally, (2) considerable variation exists in the actual individualization of IEPs due to a number of factors such as school culture, classroom setting, teachers’ use of assessment data, and (3) collaboration in developing IEPs is varied with noticeable limitations in the involvement of parents, other professionals, and students. When looked at alongside the

synthesis of the literature from Mitchell, Morton and Hornby (2010), Rose et al. (2010) and Sopko (2003), it is evident that common issues exist which are the basis for current study on the IEP process and which generate questions for further inquiry to provide a better understanding of the means by which the IEP process can be improved. My study is situated within this body of work, aimed at affording important insight into the IEP process in Ontario.

### **Chapter Summary**

This chapter has provided an overview of the relevant scholarly literature concerned with the IEP process, disability meaning, developmental disability, and special educational needs. Recent works concerning the meaning of disability, developmental disability, and special educational needs were examined to suggest the implications of these conceptualizations for shaping the hegemonic discourse around the IEP process in education policy and teacher practice. The review offered a picture of how the IEP process is viewed in the education of students with disabilities and of the investigative interests in the field. Selected works reveal current thinking associated with the IEP in educational policy and practice, common concerns related to IEP processes, and point to prevailing issues surrounding the IEP that remain open for further study. Based on this review of the literature, the following considerations are noted as especially relevant to creating the scholarly space for my own study. Firstly, there is a lack of theoretically-based research into the IEP process and the associated discourses related to this practice in schools. Secondly, research has yet to comprehensively examine educators' conceptualizations of disability and special

education needs when developing IEPs and in turn, the IEP's role in constructing the identities of students with disabilities. The existing literature can be argued as missing important information that connects the meaning of disability and special education needs to individual education plans. Thirdly are questions of how the IEP process creates and shapes school experiences that are inclusionary and/or exclusionary, and its implications to the marginalization or separation of students academically and socially. Finally, research suggests that the effectiveness of the IEP process on student learning and on pedagogical practice remain areas in need of comprehensive study. Recognizing the implications of these knowledge gaps locates my research at the centre of addressing some of these longstanding and important issues. In the next chapter, the theoretical framework for this study is presented, drawing on disability theory, critical social theory and the concepts of Pierre Bourdieu to consider the dynamic factors that interact and combine in the IEP process.

## Chapter 3

### Theoretical Framework

*Theory is a way of asking that is guided by a reasonable answer.*

(Wolcott, 2009, p.75)

#### Chapter Overview

In this chapter, I outline how I worked theoretically in doing the research, clarifying the theoretical orientations used to inform the study and the analysis and interpretation of data. These orientations speak to how I viewed what I thought was going on with the phenomenon studied (Maxwell, 1996) in light of my own beliefs and perspectives brought to the study as a result of my experience as an educator in Ontario. I acknowledge that this experience was influential in determining the critical theoretical orientations adopted. That is to say, my critical vantage point developed out of wanting to add critical dialogue to the conversation about the IEP process given my own experience and the literature in this area.

The chapter begins by noting the *bricolage* (Guba & Lincoln, 2005) of inquiry paradigms influencing my theoretical position taken for this inquiry. I briefly discuss disability theory as a critical realist lens which was integrated into my theoretical framework to provide a more adequate basis for doing the study. I follow this with an explanation of how critical social theory shaped the research as “the guiding set of beliefs and principles that [became] the basis for actions” and for “the direction of exploration and analysis” (hooks, 2004, p. 56). The chapter then moves to discussing the critical social theoretical perspectives and concepts of Pierre Bourdieu (1930 - 2002)

that constitute the primary theoretical lens informing the research and the analysis and interpretation of data from interview transcripts and institutional documents. The chapter concludes with a summary of the components of my theoretical framework.

### **Inquiry Paradigms**

Creswell (2007) states, “Qualitative research begins with assumptions, a worldview, the possible use of a theoretical lens, and the study of research problems inquiring into the meaning individuals or groups ascribe to a social or human problem” (p. 37). To situate my critical engagement with the research issue, I conceptualized the study epistemologically and ontologically to generate the theoretical framework that fit with my inquiry interest. This framework emerged as a result of my journey through theoretical works and relevant literatures while reflecting on my own experience as an educator in special education. It became evident to me that an interpretive, constructivist research paradigm was the most legitimate and meaningful context for approaching the research issue in that this paradigm not only views the existence of multiple realities that are constructed socially, culturally, and historically, concerns the meaning-making activities of people (Lincoln & Guba, 1985; Guba & Lincoln, 2005; Schwandt, 2000), but attends to the real-world contexts of study participants (Bloomberg & Volpe, 2012). Creswell (2007, 2009) points out that the goal of research within a social constructivist orientation is to rely on the views of participants as much as possible in order to make sense of the meanings they make and ascribe to the situation before them. Locating the study within an interpretivist paradigm meant that as the researcher, I recognized that inquiry is value-bound, influenced by the context under study as well as by the values

and viewpoints of the researcher (Guba & Lincoln, 2005; Hammersley, 2011; Lincoln & Guba, 1985).

This positioning was complemented with pragmatism and the critical theory paradigm that includes disability theoretical perspectives in that these views supported a contextually based view of inquiry and the use of a combination of data collection and analysis methods when necessary; furthermore, the focus of concern is on the research problem and workable solutions to this problem (Patton, 2002). Together these understandings laid the groundwork for the theoretical framework guiding the research.

## **Theoretical Orientations**

### ***Disability Theory and Critical Social Theory***

The theoretical framework for conducting the study pulled together disability theorizing and critical social theory to consider the individual and collective beliefs, perspectives, practices, and meanings expressed in the narratives of teachers and institutional documents for developing IEPs for children with developmental disability. I took up the tenets of Disability Studies in Education (DSE) as a field grounded in Disability Studies (DS) to complement my theoretical approach to the research from a critical, social and educational perspective. I was drawn to a DSE lens because of its critical position to challenge the traditional positivistic approaches to special education research in favour of open inquiry. Thomas and Loxley (2007) agree that in special education, “foci for analysis do not usually lend themselves to the analytical instruments borrowed from the major disciplines” and therefore, the need for different forms of enquiry and analysis (p. 7). As Connor et al. (2008) conclude, “the aim of DSE is to

deepen understandings of the daily experiences of people with disabilities in schools and universities, throughout contemporary society...More specifically, and within the realm of praxis, DSE works to create and sustain inclusive and accessible schools” (p. 441-2). For my study, the tenets of a DSE stance resonated for me in that they include contextualizing disability within social and political spheres that fit with the critical social theoretical position I took and the research issue under study. The unifying perspective within DSE is that disability is a social construct. Connor et al. (2008) state:

[D]isability is not a ‘thing’ or condition people have, but instead a social negation serving powerful ideological commitments and political aims. As such, DSE brings diversity in thought and plurality of perspectives about disability into the educational arena long dominated by traditional conceptualizations of disability that continue to justify and thus provide consent to the current field of special education. (p. 447)

I note the current tensions and contradictions in disability theory documented by Gable (2014) who adopts a critical realist lens to discuss disability theorizing and its connection to current practices in education. She suggests that tensions in theorizing disability have generated an uncertain professional knowledge base and have “produced concern regarding the enculturation of teachers into reductionist understandings of disability that limit the development of inclusive educational environments” (p. 86). Gable adds that these disagreements and tensions are problematic for decision making by educators with respect to making decisions about how they will respond to students with disabilities. For my research purpose, three theoretical models of disability, as

presented in Chapter 2, are used in the analysis and interpretation of teachers' conceptual understandings of developmental disability and special educational needs. Connecting these disability models to IEP development was as much for framing teachers' and institutional understandings of disability as it was for delving into the embedded set of core beliefs that frame assumptions about disability, IDD, and the special needs of children. I was guided by my premise that the IEP is a significant mechanism for theorizing disability and special needs in contemporary schooling. Based on this premise, the IEP process can be argued as providing the means for looking at the application of certain theories of disability with school systems, the persistence of traditional medical model of understandings, and reasons for the failure of social models of disability to gain traction in a resistant education system (Allan & Slee, 2008; Oliver & Barnes, 2010).

The use of critical theory was adopted in the study in that this theoretical approach is not only interested in studying and understanding the world, but studies it for the purpose of critiquing and changing it by focusing on how power and oppression shape everyday life and human experience (Kincheloe & McLaren, 2005; Patton, 2002). Similarly, Fine (2009) argues that critical social theory allows researchers to see the particulars of what they study as part of larger patterns of oppression and the human struggle for social justice. A critical social lens also takes into consideration the personal experiential factors that were instrumental in my adopting a qualitative research approach. For example, my own narrative in Chapter 1 reflects on my professional experience in education that led me to question the educational discourse surrounding



the IEP process. As a researcher coming from an insider position, a critical social theoretical lens was seen as providing a more accurate picture of IEP development, shedding light on the deeper social meanings embedded in the IEP development process and the particular narratives that play out and legitimize the meanings that inform this process. Importantly is Anyon's (2009) recognition that critical social theory is a powerful tool to connect what goes on in schools to their larger political and social meanings.

Therefore, since my research concerned a world I already knew as an educator, critical social theory and disability theoretical perspectives combined to allow me "to make the familiar 'strange' so as to make it visible" in order to learn something that I did not know before (Anderson-Levitt, 2006, p. 286). These theories were important for shaping the kind of qualitative data needed for understanding teachers' stories of students and for understanding which stories of students with developmental disabilities play out (Sears & Cairns, 2010) in the context of IEP development. Taken together, these theories constituted the conceptual organization of my research approach to make sense of the data and for guiding the various iterations of my analytical coding scheme applied to this data.

As I explored the theoretical literature, I continued to return to a Bourdieuan framework for looking at my research issue. Bourdieu (1998) suggests that critical social theory epistemology is not a solution to a problem but a methodological tool for analysing and critiquing educational systems. In light of this orientation, the theoretical wisdom of Bourdieu offered me the particular thinking tools for interrogating the

beliefs, meanings, knowledge, and actions underlying the IEP process so that they could be analyzed and made visible. At the same time, his theoretical constructs challenged me to think about my own beliefs, experiences and actions which were once vital to my identity as a special educator. Bourdieu contends that education systems are plagued with power, the status-quo, and approaches that limit the enactment of equity, social justice and innovative practices. With disability theory and the critical social theory of Bourdieu 'in my backpack' (Fine, 2009) to provide the conceptual coherence (Lesham & Trafford, 2007) for the study, my own thinking and actions were conceptually grounded to analyze and explain the thinking and actions of teachers.

In Wolcott's (2009) view, I am 'a theory borrower'. He states that qualitative researchers are "theory borrowers" drawing on the thinking of others to approach the study, guide the inquiry process, ask questions and 'ferret out' assumptions in the analysis of findings to produce reasonable answers (p. 71). At the same time, Kincheloe and McLaren (2005) contend that a theory is not a lens through which we see the world but rather a tool that helps us "devise questions and strategies for exploring it" (p. 306). I now turn to further explicating Bourdieu's theoretical method and the conceptual thinking tools he developed to examine and explain the social processes, situations, and particular sets of practices experienced by individuals. In other words, to understand why and how things get done (Jenkins, 1992).

### **Theoretical Method of Pierre Bourdieu (1930-2002)**

I came to the theoretical constructs of Pierre Bourdieu because his focus is on research-based engagement with social life and doing research in a relational way to

understand the social world. Further, not only are his theoretical concepts and methodological approaches, such as the need for reflexivity, valuable to researching educational processes and practices, they “can contribute to researching and understanding educational policy” (Rawolle & Lingard, 2008, p. 729). In that my study involved both researching and understanding teachers’ practice and institutional documents, Bourdieu’s work emerged as the primary component of my theoretical framework.

Importantly for my study is Bourdieu’s view that the object of research is socially produced and understandable in terms of social spaces and relationships that pertain to a particular time and place (Bourdieu, 1977; 1985, 1989, 1992, 1998, 1999; Bourdieu & Wacquant, 1992; Fantasia, 2008; Grenfell, 2008, 2010; Grenfell & James, 2004; James, 2011; Jenkins, 1992; Jones, 1976; Nash, 1990; Robbins, 2006, 2008; Silva & Warde, 2010; Wacquant, 1989; Warde, 2004). A pragmatic relationship with Bourdieu’s work supported my view that critical study of the IEP process required a consideration of the inter-relatedness of this process and the social spaces and relationships in which it operates. Further to this is that his theoretical approach is particularly concerned with the visible social world of practice, locating practice within the social constructs of space and time (Bourdieu, 1977, 1989; Jenkins, 1992).

Thus, Bourdieu’s “*thinking tools*” (Bourdieu in Wacquant, 1989, p. 5) offered a pragmatic way to view and analyze the social world of schools in terms of what happens in the process of IEP development as well as the structuring influences that shape and produce the social meanings and narratives underlying teachers’ work in this process.

His methodological concern is for the researcher to practically engage with the research process in order to understand and make sense of a social world and the distinctive processes and practices of a social phenomenon. For this reason, Bourdieu demands a systematic critical examination of the social world “out there”, and a critical analysis of the social world “in here” [of the researcher] to answer questions on how the thoughts and actions of social actors are influenced within a particular *field* that is the social context in which the person [such as the student], is socially produced (Fantasia, 2008, p. 212).

In addition, a fuller deployment of Bourdieu’s approach requires looking at the relationship between different fields such as education and medicine, and the relationships between his theoretical concepts in the analysis of field practices. By drawing on Bourdieu’s approach, important questions are asked about “how exactly have representations made by actors in *one* field come to have such influence on the actions and thoughts of others in *another* field?” (Fantasia, 2008, p. 215). For example, in the process of IEP development, I ask “How are the representations of developmental disability and special needs made by actors [teachers] in the field of education informed by those in another field such as medicine or psychology?” To take this point further, “How are representations of developmental disability and special need in regular education influenced by those in special education?”

My analysis gets at questions of how cultural and institutional social structure (social reality) “and the internalised ‘subjective mental worlds of individuals as cultural beings and social actors are inextricably bound up together, each being a contributor to –

and, indeed, an aspect of – the other” (Jenkins, 1992, p. 17-18). Accordingly, to uncover the workings of education systems in this respect, Bourdieu’s theoretical method provides critical ways to explain and illuminate social phenomena and practices such as IEP processes in school systems. In that the study is situated within an interpretive paradigm that moves away from a positivistic understanding of human action to inductively make sense of the meaning of human action, a Bourdieuan lens attends to the meaning-making and actions of people. For me, by engaging with Bourdieu’s critical social theory, I had the means to approach the data from a different interpretive stance that I felt was needed.

In linking what teachers do and don’t do in the context of the IEP process to Bourdieu’s theoretical explanations, his logics of practice and conceptual constructs are useful for looking at the particularity of teachers’ experience, knowledge and understandings, and for looking at how these understandings “are formed, deployed, gather authority and take hold” (Slee, 2011, p. 99-100). Bourdieu’s perspectives allow for looking at social and institutional structures that influence and shape these particularities as the field for analysis (Bourdieu, 1985, 1986, 1991, 1993). As Jenkins (1992) asserts, Bourdieu “raises tricky questions and helps to provide some of the means by which they may be answered”, describing his concepts as “enormously good to think with” (p.11). Hence, thinking within a Bourdieuan framework provides a useful means for thinking about the social forces, power structures, and relations within educational organizations that determine how schools respond to children with disabilities. Four general principles are described by Swartz (2008) as helpful for orienting Bourdieu’s

theoretical approach: (1) integrating objective and subjective forms of knowledge, (2) constructing objects in sociological research, (3) thinking relationally, and, (4) using reflexivity as a central methodological concern. Drawing on these principles, I viewed IEP development as a dynamic and complex social process at work in schools in a particular time and space, with its own structuring forms of knowledge, hierarchy, power forces, and sets of relations. For me, Bourdieu helps to interrogate the IEP process in a way that it can be understood in relationship to particular social contexts, discursive practices and institutional discourses, to people and to things such as curricula and resources, to individual positioning in schools, and to social forces that shape and are shaped by this practice.

### ***Bourdieu's Theoretical Constructs***

Rather than presenting a *grand social theory* through which the social world can be studied, Bourdieu's conceptual thinking tools constitute his theoretical approach for studying social reality and the structuring social processes that produce that reality (Grenfell, 2010). DiGiorgio (2009) describes Bourdieu's conceptual tools as having a useful place in special education research especially for addressing the segregation of students with disabilities in schools. In a similar vein, Klibthong (2012) states that "Bourdieuian conceptual tools offer refreshing epistemological and reflective radars for re-imagining and enacting pedagogical practices that contribute to all children's holistic development" (p. 71). Furthermore, Grenfell (2008) adds that Bourdieu's conceptual tools provide a critical way to explain the mechanisms and "hidden generating structures" of school systems (p. 85) that underlie pedagogical practices.

Given these viewpoints, my interest was to apply his primary *thinking tools* that include his concepts of habitus, capitals, and field to the issue of IEP development for children with IDD. Moreover, applying Bourdieu's notions of logic of practice, thinking relationally, reflexivity, social reproduction, and symbolic power and violence fit well into my analytic framework for understanding teachers' work in this process and the institutional discourses directing their professional work. The application of Bourdieu's concepts called for applying his concepts as a relational set of thinking tools that are interconnected and therefore to be viewed relationally to study and analyze social processes (Grenfell, 2008). In that each thinking tool offers an important perspective for looking at the practice of IEP development, I clarify the individual meanings that Bourdieu ascribes to each of these concepts.

### *Habitus*

Bourdieu conceptualizes *habitus* as "internalized embodied social structures" (Bourdieu, 1989, p. 18) and "cultural unconscious or mental habits or internalised master dispositions" (Bourdieu, 1989 in Houston, 2002, p. 157). Habitus includes beliefs, norms, values, and attitudes of individuals. The concept of habitus is "a way of talking about the embodiment of previous social fields, whereby individuals acquire and carry ways of thinking, being and doing from one place to another. It is about how past social structures get into the present action and how current actions confirm or reshape current structures" (James, 2011, p. 3). For Bourdieu, the school is a habitus reproducing site: a site of selection, social and cultural reproduction, and a site for accumulating cultural and symbolic capital. Bourdieu (1989) sees teachers as social agents whose

habitus is constituted by forms of capital acquired through past experiences, skills, and knowledge passed on through culture and training.

It is the habitus of teachers, together with their various cognitive and cultural capitals that Bourdieu argues as dictating how they approach teaching and classroom practice. While habitus is brought to bear on the actions and dispositions of actors (teachers, students) that can be traced to earlier socializations (family), organizations such as school systems can instill certain dispositions significant to the organization. He suggests that habitus is dynamic and continuously adaptive. Importantly, habitus is embodied but visible through practice (Bourdieu, 1998).

Intrinsically tied to Bourdieu's concept of habitus is that it is seen as generating the dispositions and mental structures from which teachers make decisions about instructional approaches used, how they plan educational programs, how they view their students, how they "relate with children... how they teach and involve them in activities", and ultimately "how they teach to include or exclude children from active participation in school work" (Klibthong, 2012, 71-72). Habitus is therefore necessary to an analysis and understanding of practice and the dynamics of fields such as school organizations in that habitus is a product of the social world (Bourdieu, 1989, cited in Wacquant, 1989, p. 43). For my study, this means connecting habitus to teachers' beliefs, values, and dispositions that are made visible through the IEP process. For Bourdieu, habitus induces a collection of possible actions while enabling the individual to draw on particular courses of action that might be constraining or transformative:

[Habitus] is a kind of transforming machine that leads us to 'reproduce' the



social conditions of our own production but in a relatively unpredictable way, in such a way that one cannot move simply and mechanically from knowledge of the conditions of production to knowledge of the products.

(Bourdieu, 1993, p. 87)

Klibthong (2012) draws on Bourdieu's concept of habitus to demonstrate that teachers produce practices to structure their students in a school which they are a part. That is, teachers can use their habitus to classify the members of their classrooms into various categories for learning curriculum, for participation in activities, and for classifying limitations in ability. DiGiorgio (2009) similarly points out that disadvantages inherent in society's view of disability are incorporated into one's habitus. The centrality of habitus in IEP development becomes a necessary concept for understanding how teachers' habitus influences and gets expressed through the IEP process.

Bourdieu considers our acts of perception and practices as "products of what already-has-been" and that these acts do not take place in a value-neutral environment (Grenfell, 2008, p. 155). He believes that habitus potentially induces a range of possible actions while enabling the person to draw on transformative and constraining courses of action, stating that "habitus is a kind of transforming machine that leads us to 'reproduce' the social conditions of our own production" (Bourdieu, 1993, p. 87). Both environment and individuals have existing values that serve the status quo and structure social practices to serve specific interests:

[H]abitus produces individual and collective practices...in accordance with the schemes generated by history. It ensures the active presence of past

experiences...in the form of schemes of perception, thought and action, [that] tend to guarantee the ‘correctness’ of practices and their consistency over time.... (Bourdieu & Passeron, 1990, p. 54)

Furthermore, for Bourdieu, *habitus* reflects a sense of one’s place in the social system and the place of others in relation to oneself within a field such as education. He does not offer a theory of *habitus* as a stand-alone concept but links *habitus* to the actions and dimensions that influence practices and beliefs of the field.

### *Field*

Similar to the concept of *habitus*, Bourdieu does not offer a theory of fields. Rather, he conceptualizes *field* as a structured and bounded social space or social arena in which there are people who dominate and people who are dominated (Bourdieu, 1985). For Bourdieu, the social world is made up of multiple and interconnected fields which operate in different, yet hierarchically patterned and similar ways. His concept of field is presented as a means to examine the behaviour and actions of actors within an organization and to consider how these behaviours and actions emerge as outcomes of the complexity of power struggles, position-takings, structuring effects, and multiple interests within and between organizational fields “that unfold over time” (Swartz, 2008, p. 48). Importantly, as Thomson (2005) states, positions in fields produce in the occupants and institutions of the field particular ways of thinking, being, and doing.

Bourdieu calls on the concepts of *habitus* and capital for analysis of field dynamics (Swartz, 2008). He asserts that within a field, individuals interact, maneuver for position and status, acquire forms of capital, and struggle in pursuit of desired equity

and social justice. Yet, within a field, there are permanent relationships of inequality that also operate. Power defines the individual's position in the field and as a result the strategies they use to transform or preserve their power (Bourdieu, 1997). "Collectively, all fields are overlaid by a field of power....Agents within the field compete for control of the interests specific to the field and use their capitals (economic, cultural, social and symbolic) in this competition" (Lingard et al., 2005b, p. 760).

Bourdieu views a field as constituted by conflict or struggle when individuals or groups seek to establish what comprises legitimate and valuable capital within that site (Grenfell, 2008; King, 2005). The sets of relationships and struggles within the field are defined by differences in some form of capital, power, or positioning. The field of power is an arena of struggle among leading agents who struggle to impose their particular capital as the most legitimate and valued for dominating the social order (Swartz, 2008). For example, the IEP process may become a site for conflict or struggle over the kinds of capital, such as resources or educational outcomes that teachers view as valuable in opposition to the views of parents or students. In this sense, the IEP process is an arena in which individuals – teachers, parents, students, and others – hold distinct positions and may struggle for positioning.

Thomson (2005) adds that in following Bourdieu, the task of the researcher is to understand the nature of the field, the rules of the field, and the narratives and truths held. Similarly, Grenfell (2008, 2010) notes that for Bourdieu, field dimensions are present in all individuals [teachers] and determine their interests (*illusio*) and actions. In turn, people act according to certain rules of the field and logic of practice. In

Bourdieu's view, a field works like a game, with its own players, rules, meanings and practices. At the same time, a field is in a constant state of flux in that its internal dynamics produce trends and chronologies of change (Thomson, 2005).

To reconceptualise the IEP process in Bourdieu's terms means seeing it as situated within a social field in which these factors all have bearing. Associated with the field are, for example, particular structural relations that are administrative, organizational, and governing, with certain rules and logic of practice that produce specific ways of thinking and associated narratives. Moreover, relations between fields such as schools and government agencies are important to analyzing the regulatory roles played by both fields and the particular forms of capital desired and imposed.

Having addressed Bourdieu's conceptual lenses of habitus and field, I now move to explaining his concept of capitals and how this conceptualization informs a deeper understanding of the IEP process and educational discourses that surrounds this process.

### *Capitals*

In Bourdieu's (1993) scheme of thinking, humans structure their social world to produce different forms of *capital* which in turn structures them to act in certain ways. For Bourdieu (1986, 1998), capital manifests in various forms and includes the resources one has available to achieve certain goals. These forms of capital include *social, cultural, symbolic, and economic capital* and to refer to the means by which participants in a field are positioned or position themselves (Agbenyega & Sharma, 2014; Bourdieu, 1998; Lareau & Weininger, 2003; Mills, 2008a, 2008b, 2013) to acquire capital. Bourdieu proposes that all forms of capital must be considered to

account for power, inequality, and the structuring and functioning of the social world (Grenfell, 2008). Importantly, he seeks to explain power, dominance, and inequality not only in terms of economic capital but in terms of cultural, social, and symbolic capital. At the same time, he views economic capital as being at the root of all other forms of capital, describing economic capital in monetary terms, wealth and possessions.

All people within a society have a position in social space such as in school or the classroom by virtue of the forms of capital they possess (Grenfell, 2008). In other words, the forms of capital that individuals possess govern the nature of their positioning and relationship in the social world. Capital positions people in a field such as education, allowing individuals to have and use power, to hold authority, to wield influence, and thus to exist in that field (Bourdieu & Wacquant, 1989). Every individual has a particular amount of capital yet the composition of their capital will differ.

Bourdieu's central concept of capital provides a unique way of examining and understanding the nature of IEP goals, why these particular goals are seen as valuable for students, and their meaning for the acquisition of forms of capital. For example, a child's position within the classroom is likely to be determined by the nature and forms of capital he or she possesses or is to acquire. Teachers' and students' positions in the classroom are informed by the hierarchy of the amount of knowledge and symbolic capital they possess (Wacquant, 1998). As a result, there is always an issue of equity and social justice when working with children where unequal amounts of cultural, symbolic, and knowledge capitals exist (Bourdieu, 1998).

Bourdieu defines cultural capital in terms of a person's (or institution's) possession of recognized knowledge and competencies including expected behaviours, habits, skills, cultural goods, linguistic knowledge, language competencies, ways of thinking, attitudes, values, and dispositions passed from generation to generation. The acquisition of cultural capital requires prolonged exposure to a social habitus such as the school. The capital of students can be seen in relationship to the academic culture required for success in school. As Mills (2008a) suggests, Bourdieu's account breaks from western psychology and neo-liberal politics that explain differences in scholastic outcomes as the result of natural aptitudes and individual abilities. Instead, Bourdieu's notion of cultural capital suggests educational differences in achievement are the result of differences in class cultural habits, the demands of the educational system and criteria used to define success within the education system. Grenfell and James (1998) state, "We do not enter fields with equal amounts, or identical configurations of capital...Some individuals, therefore already possess quantities of relevant capital...which makes them better players than others in certain field games. Conversely, some are disadvantaged" (p. 21).

Social capital refers to the actual or potential personal and social resources linked to social networks, one's connections, social ties, and membership in a group. Social capital comes from belonging to particular social groups or classes and is acquired through the network of relations that individuals have within the field; Bourdieu considers the field, such as the field of education, as mediating the interactions of individuals in a group or class and what they are able to do in specific social, cultural,

and economic contexts (Grenfell, 2008). Students are connected to and interact with each other as a result of membership in a group through sorting practices of school systems. Given these practices, students are able to build their social capital according to the groupings and network relations in which they are positioned. The more prestigious the grouping, the more accumulation of social capital. I apply this concept to think about the ways in which students are positioned to accumulate social capital by membership in certain groups in schools, especially when membership is based on dis/ability or exceptionality. This concept provides a lens for also considering how the IEP process positions students' membership in specific groups of learners within school settings and subsequently their access to other forms of socially valued capital.

Finally, symbolic capital represents one's prestige, academic standing, status, and credentials that are acquired over time. According to Bourdieu (1997) the accumulation of symbolic capital depends on the value given to the forms of capital through social recognition. For example, in education, value is placed on academic achievement and credentials. Because of the social recognition given to these credentials, individuals increase the amount of symbolic capital they possess. In Ontario, the achievement of the provincial curriculum could be seen as a form of symbolic capital. Bourdieu sees cultural and social capitals as constructs through which the educational achievement and differences in academic attainment of students from various groups and classes can be explained. He further suggests that symbolic capital works with other forms of capital to advantage or disadvantage individuals and to position them in multiple fields.

Employing Bourdieu's concepts of capital in my research enabled me to look at how the education field produces socially valued capital, how it distributes capital to students, and how it positions certain students to accumulate valued capital (e.g. the provincial curriculum) in relationship to the IEP process. A relational understanding of habitus, field, and Bourdieu's use of capital is important to understanding how children with disability are defined and positioned within the school to accumulate forms of capital dictated and (re)produced through the process of IEP development.

### *Thinking Relationally*

Bourdieu brings together his theoretical thinking tools of habitus, field, and capital as the three master concepts of his theoretical approach to understand the dynamics of practices and social processes. These concepts do not stand alone in Bourdieu's method (Bourdieu & Wacquant, 1992) but instead, Bourdieu views all his master concepts as intimately connected and operationalized relationally. He does not treat them as separate entities but relationally as interconnected concepts that make up the structure and conditions of the social context studied (Grenfell, 2008; Grenfell & James, 2004; Silva & Warde, 2010; Swartz, 2008; Wacquant, 1989). His "theoretical ensemble" of concepts "sit in synergistic relationship to each other" (Rawolle & Lingard, 2008, p. 729). Swartz (2008) also adds that Bourdieu deployed these concepts "within a relational perspective that was fundamental to [his] thinking" (p. 45). Thus, engaging with these concepts means understanding the systematic unity to Bourdieu's approach in that his concepts of habitus and capital are considered to generate practices within a field. Bourdieu invites the researcher to consider the interaction of habitus,



capital, and field dynamics in bringing about the dispositions and actions of social actors (teachers). As the researcher, I was encouraged to attend to practices that flow from the intersection of habitus, capital, and actors' positions in the field or organization of the school system.

A Bourdieuan perspective therefore brought to the study a more sociological-centered understanding of the IEP process in that his approach methodologically, “sees social phenomena in terms of *structural relations* – both cognitive and social. Things are understood in terms of their *relational* context...For Bourdieu, ‘the real’ is relational because reality is nothing other than *structure*, a set of relationships” (emphasis in original, Silva & Warde, 2010, p.17). Grenfell (2010) states Bourdieu engaged inductively, using his concepts and methods to develop theoretical statements for explaining the relations he saw after being immersed in data. Bourdieu considers theory to be a thinking tool and a temporary construct or model of ideas that comes and goes:

Let me say outright...that I never ‘theorise’....There is no doubt a theory in my work, or, better, a set of *thinking tools* visible through the results they yield, but it is not built as such...It is *a temporary construct which takes shape for and by empirical work*. (emphasis in original, Bourdieu, in Wacquant, 1989, p. 50)

In this way, Bourdieu developed his key concepts, looking at phenomena “in relation to their position with respect to other phenomena which share the context” (Grenfell, 2010, p. 17). Thinking relationally therefore, is central to Bourdieu’s view of research in that it is used to uncover and understand the activities of people in terms of the social arenas in which they exist and in terms of the social relationships that occur in a particular place

and time (Grenfell, 2008). Importantly, his theoretical tools represent various levels of interaction in the social arena of schools, constituting key concepts through which teachers' beliefs and actions in IEP development can be examined and analyzed. In this regard, Bourdieu forces us to look at the set of relationships that exist and operate within the context of the IEP development process. Insights drawn from his work also offered me a critical way of viewing my research issue in terms of the interrelatedness of the IEP with social processes such as social reproduction, social stratification patterns, and social structures. Given Bourdieu's notion of thinking relationally, my interest was to understand the research issue in relation to people (teachers), organizations (school systems), and to a time and place (context).

#### *Logic of Practice and Forms of Knowledge*

Social practices are "the foundational concept" of Bourdieu's work, "constituting the concept as a rich but open category for activities that have a social character and meaning, the specific details, structure and effects of which emerge in research" (Rawolle & Lingard, 2008, p. 730). Simply put, for Bourdieu, what people do is called practice. Warde (2004) recognizes that Bourdieu talks of practice in terms of three interconnected associations: carrying out an activity, formally naming the activity that sets its boundaries and gives it social organization, such as naming and instituting IEP processes, and finally, differentiating practice from any theory about practice.

To think critically about teacher practice in IEP development, I found Bourdieu's perspectives to be challenging and helpful. He sees social life as a game where there are rules of the game that are learned experientially and through explicit teaching about

what players can do and cannot do (Grenfell, 2008). In his scheme, practice is a product of processes which are neither wholly unconscious or conscious. Yet practice is not without purpose in that the players (people) have goals and interests. Understanding practice requires knowledge of its distinctive features, recognizing that practice is rooted in social interactions between individuals' behaviour, with others and the environment, perceptions held of the social world, and perceptions that explain and give logic to practice and the products of practice.

In Bourdieu's (1977) *Outline of a Theory of Practice*, he offers two different approaches to the analysis of what actually is happening in schools that can be applied to IEP development: a structural objectivist analysis that considers the functions performed by the practice, and in contrast, a subjectivist or interactionist analytical approach to show how people experience the practice and the meanings they attach to it. For Bourdieu, these two analytic approaches give different and/or opposing explanations of what actually happens while recognizing that both explanations can be accurate (James, 2011). Taking up these two approaches, an objectivist analytical view rooted in Bourdieuan thought invites asking what can be revealed through the narrative data that explains the functions performed by the process of IEP development and also asking what is being concealed in this process? Using a subjectivist analytical approach asks about the meanings attached to this process. Bourdieu provides a critical way to think about and capture subtleties by working across and between objectivist and subjectivist explanations in dealing with analysis of the social world (James, 2011). That said, both analytical approaches provide a systematic way of looking at what happens in schools in

relation to the IEP process and to what teachers actually experience in this process and the meanings they attach to it.

What Bourdieu also suggests is that examining social practices requires considering that something more subtle may be going on. Therefore analysis necessitates looking at the concealed or hidden meanings of a practice which he calls *misrecognition*. James (2011) and Grenfell (2008) note that for Bourdieu, misrecognition is about displacement of understanding in that what we believe happens or has happened is not necessarily so. Yet, they state that, as Bourdieu contends, the interest of the individual is served by misrecognition. Rawoell and Lingard (2008) conclude that for Bourdieu, practices are public, subject to scrutiny by other actors, and are relational. Producing a practice [such as IEP development], is social and negotiated given time constraints and the multiplicity of actions that are involved. They add that the concepts Bourdieu used to explain patterns of practice produced by groups and individuals are habitus and field.

### *Reflexivity*

Any discussion of Bourdieu's theoretical method must acknowledge his view of the ongoing need for reflexivity in doing research. For Bourdieu, there is the need for constant reflection on the effects of our research methods upon research results, and for constant reflection on how the researcher is a part of the social world under study and therefore constructs or constitutes that world as an object of analysis (Grenfell, 2008; Jenkins, 1992/2002; Wacquant, 1989). Bourdieu views reflexivity as a major methodological concern in the research process, not only in relation to the researcher

being able to practice a valid analysis of that social world or phenomenon of which they were or are a part, but that for Bourdieu, all of his theoretical concepts are to be used reflexively and relationally in the process of doing research and analysis. “All of Bourdieu’s concepts are to be employed reflexively. They call for critical examination of all assumptions and presuppositions not only of the sociological object investigated but also of the stance and location of the researcher relative to the object studied” (Swartz, 2008, p. 46). If the researcher is to ‘think with’ Bourdieu, then the relationship between the researcher and the issue or matter being studied is an important concern and must be made clear (Grenfell, 2008; James, 2011; Jenkins, 1992; Wacquant, 1989). Recognizing this need for reflexivity, the centrality of my personal experience as an educator in Ontario was recounted in the introductory chapter.

*Social Reproduction, Symbolic Power and Symbolic Violence*

A Bourdieuan lens allows for understanding the IEP process as a form of social reproduction in which the teacher is a distinctive social actor in this process. Bourdieu tells us that the interests of educational systems is in reproducing the social order. Whether intentional or unintentional, these interests may contribute to positioning students in certain ways in the school system, perpetuating pedagogical practices that distinguish and separate students. Bourdieu argues the interests of the school system to segregate certain students and to produce and maintain the social order through particular mechanisms and discourses within the institutional field (Grenfell, 2008). Bourdieu offers the conceptual lens through which the IEP process can be questioned as a process of social reproduction given that the education system at all levels appears

predisposed to remake itself according to the interests of the system and the social order of the society in which it exists.

In keeping with this point, Bourdieu illustrates how social differentiation in schooling is linked to people's activities and the social reproductive nature of the school system (Grenfell & James, 1998). Bourdieu (1998) brings to the forefront the central role that schools play in reproducing social and cultural inequalities, describing the school system as an institution for the reproduction of legitimate culture and for producing "agents capable of manipulating it legitimately" (Bourdieu & Passeron, 1990, pp. 59-60). Moreover, he argues that it is the culture of the dominant group – the group that controls the social, political, and economic resources – that is embodied in schools. Thus, educational institutions ensure the reproduction of the cultural capital of the dominant group (Mills, 2008a, 2008b).

To look at the ways in which teachers represent students in IEP development, I borrowed from Bourdieu's views on the power of the education system to select and include students based on ability and their chances for academic attainment. From this perspective, his conceptualization of symbolic power and violence gave me the lens to consider how the categorizing of students based on disability and special needs for IEP development reflects these concepts. Bourdieu states the need to consider the relation a student has with the school and the culture it transmits "according to the probability of his [or her] survival in the system": One must go "to the principle underlying the production of the most durable academic and social difference, the habitus – the

generative, unifying principle of conducts and opinions which is also the explanatory principle...” (Bourdieu & Passeron, 1990, p.116).

Importantly, these notions speak to a selection process within schools as well as to the understandings teachers have about students for developing IEPs that are attached to the probability or the improbability of students’ entering into this or that stage of education. To understand the actions and meanings that are articulated through the IEP process, I draw on Bourdieu’s assertion that social classifications operate in school practice and shape who is dominated and who dominates the education field. Bourdieu and Passeron (1990) state teachers’ judgments on their pupils transmute social classifications into school classifications. Bourdieu illustrates how social differentiation in schooling is tied into individual people’s activities and “the social reproductive nature of the school system” (Grenfell & James, 1998, p. 57). His view of social reproduction can explicate how schools impose meanings as legitimate:

[Analysis] is not confined to an examination of the social selection of students at different levels of the educational system...but observes closely the actual process of pedagogic action...[to] reveal more clearly the diverse ways in which cultural reproduction contributes to maintaining the power of dominant groups.

(Bourdieu & Passeron, 1990, p. xv-xvii)

Bourdieu claims that pedagogic action is not aimed at equal opportunities within schools but instead corresponds to the objective interests of dominant groups that form the content of teaching and learning (Grenfell, 2008). He believes that teachers fabricate an image of their students, their school performance and their academic value. Schools

impose exclusions and inclusions, functioning as a huge classificatory machine which forms the basis of the social order and which legitimizes in subtle ways the distribution of powers and privileges hidden behind the impeccable appearance of equity. Bourdieu argues it is the education system itself and the interpretations of teachers “that turn ‘difference’ into ‘disadvantage’ or ‘deficit’” (Curtis & Pettigrew, 2009, p. 96). His concept of “*symbolic violence*” becomes an important idea in that students ‘are told who they are’ (Grenfell, 2008; Ware, 2001) and how they are to be positioned within the education system. Grenfell (2008) contributes to this view by stating that Bourdieu believes because we live in symbolic systems, symbolic violence and symbolic power and domination occur through processes of classifying and categorizing people, imposing hierarchies and ways of being in the world, that result in the marginalization and powerlessness of some people.

I note that Bourdieu’s work on education came partly from his desire to understand “what it was to be a student” (Bourdieu & Grenfell, 1995, p. 4; Grenfell, 2010, p. 15). To take this further in light of my own inquiry, this research work indirectly informs an understanding of ‘what it is to be a student with a developmental disability’ in the context of Ontario’s school system. Importantly, Bourdieu’s thinking tools enable the perception of something from a different perspective or different light. For my study, his theoretical concepts are seen as especially relevant to practices in special education, such as IEP development, just as they have been acknowledged by others for examining the field of education in general (Grenfell & James, 2004; Harker, 1984; Lareau & Weininger, 2003; Nash, 1990; van Zanten, 2005). Through this



engagement with Bourdieu, the complexity of factors involved in IEP development can be considered to reveal how students with disability are positioned in schools through pedagogical practices and structures that shape this positioning.

### **Chapter Summary**

This chapter described the theoretical framework used for the study. Social constructivism and pragmatism were presented as the overarching paradigms in which the research was situated, noting that these multiple perspectives, or *bricolage* created the appropriate inquiry space for the study (Guba & Lincoln, 2005). The chapter then addressed disability theory and critical social theory as the complementary theoretical orientations for attending to the research issue. These lenses were noted as fitting well with the research paradigms for the study and for doing inquiry aimed at producing knowledge for action and change. Emphasis was placed on the theoretical constructs of Pierre Bourdieu which were outlined as the primary thinking tools used in the research. Specifically, Bourdieu's theoretical tools of habitus, field, capitals, and constructs of thinking relationally, logic of practice, reflexivity, social reproduction, and symbolic violence were presented. In the next chapter, I progress through a description of the research design describing the methodological approaches taken in conducting the study and the methods used in the collection and analysis of data.

## Chapter 4

### Research Methodology and Methods

*None of us are to be found in sets of tasks or lists of attributes; we can be known only in the unfolding of our unique stories within the context of everyday events.*

(Paley, 1990, p. xii)

#### Chapter Overview

This chapter presents the qualitative research design, methodological traditions, and the specific research methods used in conducting the study. The rationale for my research approach is discussed, emphasizing the need for using research methodology that is exploratory, descriptive, constructivist and interpretive. Drawing on supporting literature to explain the methodological choices made, I describe case study and narrative inquiry methodologies as the qualitative traditions informing the research. Given my intent to examine the narrative accounts of classroom teachers and the prevailing discourses of educational documents as a means to investigate the thinking and practices underpinning the IEP development process, these traditions are highlighted as complementary approaches that importantly create the space for addressing the research purpose and questions. Research procedures are outlined that include a description of research sites and the recruitment of research participants. Based on the type of information needed for this study, semi-structured interviews and reviews of documents from the Ontario Ministry of Education and participants' local school boards are presented as the primary sources of data. Procedures used in the

analysis of data are then outlined in detail. The chapter concludes by addressing issues of researcher reflexivity, the ethical considerations involved in the study, and issues of soundness, credibility and trustworthiness of the research.

### **Qualitative Research Design Rationale**

I introduce my engagement with qualitative research and reasons for adopting this design by noting that qualitative inquiry is concerned with examining a social situation in order to understand the meanings that people construct and attribute to their actions and experiences in a particular context at a particular point in time, and to understanding how the complexities of one's sociocultural world are interpreted, understood, and experienced (Bloomberg & Volpe, 2012; Merriam, 1998, 2009, Patton, 2002). Importantly, qualitative inquiry is a situated activity through which the researcher studies phenomena in their natural settings and in terms of the meanings people bring to them (Denzin & Lincoln, 2005). Given these concerns, a qualitative research design fit within the interpretivist, constructivist inquiry paradigm of the study in which my research interest was to examine, interpret and describe the meanings and experiences of classroom teachers in the context of the IEP development process. Furthermore, my motivation for taking a qualitative stance comes from the research literature in which a number of authors argue that qualitative research is a valuable methodology for doing research in special education and disability studies in education, for informing policy and practice in special education and inclusive education, and for examining the extent to which certain practices have a constructive impact on individuals with disabilities and

the settings where they are educated (Brantlinger et al., 2005; Ghesquiere et al., 2004; Pugach, 2001; Thomas & Loxley, 2007).

Through a qualitative research design, my emphasis was on producing a deep awareness and description of the dynamic narratives that shape and inform teachers' work in developing IEPs. As Wolcott (2009) states, "Description provides the foundation upon which qualitative inquiry rests" (p. 27). Descriptive information produced included contextual information important to understanding the school context within which research participants worked and in which educational documents were a part, demographic information about research participants such as teaching qualifications, teaching experience, and classroom setting that potentially influenced teachers' perceptions, experiences, and practices, and perceptual information pertaining to concepts, meanings, and explanations of practices related to IEP development and the individualization of educational programs for students with IDD. Broadly speaking, qualitative data answers questions about "what is happening, how it is happening, and why?" (Shavelson & Towne, 2002, p. 99). Thus, a qualitative research design in which I was able to draw on case study and narrative research approaches, allowed me to enter and engage in the real-life context of teachers' work. This design enabled me to produce the descriptive information that would best respond to the overarching research question that asked "What are the prevailing narratives and the components of these narratives that inform and direct IEP development for children with IDD in Ontario's public school system?"

As the research instrument (Creswell, 2007, 2009; Merriam, 1998, 2009), I entered teachers' classroom worlds as an insider because of my own teaching experience and as an outsider doing research. I was mindful that my choice of methodology needed to provide the space for the study's participants to freely express their opinions, beliefs and perspectives. As such, the research approaches taken respected the unique voices and perspectives of study participants that could "make visible the *lived* knowledge and experience of educators" and provided the means "for capturing the layered and rich thickness of meaning that is integrated within educational experiences and practices" (Porter & Smith, 2011, p.1-2). To produce an in-depth understanding of the IEP process in schools, I turned specifically to the use of qualitative case study (Berg, 2009; Creswell, 2007, 2009; Merriam, 1998, 2009; Patton, 2002; Stake, 1995, 2005; Yin, 2003, 2006, 2009) and narrative inquiry methodologies (Chase, 2005; Clandinin, 2006, 2007; Clandinin & Connelly, 1995, 1996, 1998, 2000; Clandinin & Rosick, 2007; Coffey & Atkinson, 1996; Conle, 1999, 2001; Connelly & Clandinin, 1990, 2006; Elbaz-Luwisch, 2007; Polkinghorne, 2010; Riessman, 2001, 2008).

## **Research Methodologies**

### ***Qualitative Case Study***

The quintessential characteristic of case study methodology is a holistic understanding of cultural systems of action where interrelated activities are engaged in by the participants in a social situation (Merriam, 1998, 2009; Patton, 2002; Stake, 2005; Yin, 2003, 2006). A case study approach allows for examining the research issue, producing knowledge that is more vivid, concrete, and rooted within the context of

participants' personal and shared experiences (Merriam, 1998, 2009). Since qualitative case study allows researchers to unravel the complexity of school and classroom realities and to bring in-depth understanding to special needs education in schools (Ghesquiere et al., 2004, p. 172), engaging with case study methodology was most suitable to my research interest. Merriam (1998) notes that qualitative case study is interested "in process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation" (p. 19). This approach provided me the foundational support for research into and analysis of teachers' work that was descriptive, interpretive, context specific and bounded by place and time. "Educational cases offer a rare window into the often private and extremely complicated journeys of educators" (Porter & Smith, 2011, p. 2). Thomas (2011) also points out that the researcher doing case study often selects the case because of familiarity and knowledge of it; the researcher is already in a good position for its study. That said, my familiarity with the research topic, as revealed in my personal narrative in Chapter 1, put me in a good position for conducting this study.

As an important point in my use of case study methodology, I identify the unit for analysis (Patton, 2002) or what constitutes the case by drawing on Stake's (2005) definitions of instrumental case study and collective case study to define the case under investigation. The concrete expectation is that the case can be identified by a set of boundaries which speak to the specific reality that is to be explored. Stake (1995, 2005) notes that *instrumental case study* is used when a particular case is examined to provide insight into an issue. Individual participant accounts are the cases that are of interest to

the researcher because of their uniqueness and commonality (Stake, 1995). At the same time, we cannot know or understand one case without knowing about other cases (Stake, 2005, p. 444).

In turn, Stake (2005) describes a *collective case study* as an *instrumental case study* extended to several cases. As Stake (2005) suggests, the researcher engaged in collective case study believes that understanding multiple cases will in turn “lead to better understanding and perhaps better theorizing about a still larger collection of cases” (p. 446). As a collective case study, the narrative accounts of study participants were brought together to produce an in-depth understanding and description of the phenomenon of IEP development. Based on the boundaries of each case, all participants’ narrative accounts were considered to be “information rich cases” (Patton, 2002, p. 230), important for what they could reveal about the phenomenon under study and “for what [they] might represent” (Merriam, 2009, p. 43). The multiple narrative accounts of teachers’ experiences, thinking and practices concerned with the IEP process make up the collective case study data from which the research findings are drawn to produce what is common to all participants’ accounts. Interpretive analysis then focused on the person-specific information and contextual-richness of the case to explore the nature of the story and its components (Ayres et al., 2003). Patton (2002) reminded me that my “first and foremost responsibility consists of doing justice to each individual case. All else depends on that” (p. 449). Looking through this lens, the voices and narratives of teachers became the means through which a clearer picture and understanding of the IEP process could emerge as well as a deeper awareness of the

current understandings of disability, IDD, and special educational needs that prevail in schools.

I note that in this research, case study was viewed as both a process of inquiry and a product of inquiry (Patton, 2002, p. 447; Stake, 2005, p.445) to uncover the complex relationships between teachers' beliefs, meaning making activities, experiences, and practices in the IEP process. As a process of inquiry, the essential characteristics of case study methodology were well suited to doing descriptive and interpretive research and to discover contextual circumstances that would shed light on the research issue (Merriam, 1998, 2009; Patton, 2002; Stake, 2005). As a process of inquiry, I conducted interpretive and descriptive research to give an in-depth account of IEP development as an area of education where there has been little study (Merriam, 1998; Patton, 2002). As a product of inquiry, case study provided for a holistic, detailed understanding and analysis of the IEP process in specific classroom settings where participants engage in interrelated activities in a social situation (Merriam, 1998; Stake, 2005; Yin, 2003). In this way, a case study approach can produce a body of knowledge as a product of the inquiry that may be of benefit to other researchers, study participants, other educators and policy makers. This knowledge has the potential to improve and transform the IEP process as well as our understandings about disability in education, special educational needs, and inclusive educational practice by bringing forth the distinct perspectives and practices of teachers.

In conceptualizing my use of narrative inquiry, I saw case study as an important and complementary research methodology. As Stake (2005) comments, "By whatever



methods, we choose to study *the case*” (p. 443). I believed a blending of these approaches would best generate the kinds of data necessary for responding to my research purpose and questions. See Table 1 for a description of the particular nuances of both methodologies that were taken to have particular meaning for this study.

### ***Narrative Inquiry***

Atkinson (2007) states that “we are a story telling species...We think in story form, speak in story form, and bring meaning to our lives through story” (p. 224). Moreover, “narrative captures the importance of context, the meaningfulness of human experience, thought, and speech within time and place; it provides opportunity to understand implicit as well as explicit rationales for action within a holistic framework” (Bazeley, 2013. p. 342). People will have a variety of perspectives on their experiences and will develop specific narratives based on their experiences (Merriam, 1998). As a result, narratives help us to organize our experiences, to construct our realities, and to guide our actions (Richardson, 2000; Smith & Sparkes, 2008).

In seeking to understand the meanings and complexities of narratives that constitute and envelop the IEP process for students with IDD, I considered that narratives are social creations and are structured according to socially and culturally shared conventions (Coffey & Atkinson, 1996). Clandinin and Connelly (2000) point out when narrative inquirers study institutional narratives, “such as stories of school, people are seen as composing lives that shape and are shaped by social and cultural narratives” (p. 43). They add that the things worth noticing are the formal structures and terms by which things are perceived. Furthermore, teachers’ sacred stories are passed

Table 1. Case study and narrative inquiry methodologies

<b>Case Study Methodology</b>	<b>Narrative Inquiry</b>
<ul style="list-style-type: none"> <li>▪ Seeks to understand phenomenon studied and produce meaning within its natural context and dependent on the interaction of individuals within that context.</li> <li>▪ Reality is multi-perspectival. There are multiple perspectives that people have on their lived experiences.</li> <li>▪ Involves the study of a bounded, integrated system (the case) or individual people that develop specific narratives based on their experiences and understandings in real-life contexts (Merriam, 1998, 2009).</li> <li>▪ The researcher is the primary research instrument in the collection and analysis of data. (Merriam, 1998, 2009; Patton, 2002). The researcher must be sensitive, a good listener, highly intuitive, and be aware of and acknowledge their own position and influence on the research including the relationship established with study participants and the data collected.</li> </ul> <p>(Merriam, 1998, 2009; Patton, 2002; Stake, 2005; Yin, 2003, 2006)</p>	<ul style="list-style-type: none"> <li>▪ Seeks to understand the social phenomena within its natural, real world context. Meaning-making is reflective and retrospective, communicating the narrator's point of view that is unique. People create stories/narratives to understand their social world, reality, events, actions, and to make meaning and construct identity.</li> <li>▪ Individual narratives created according to perspectives people have about their reality, experiences; emphasis on voice. There are multiple perspectives that can be known based on people's experiences and accounts.</li> <li>▪ People's narratives are constrained by or enabled by situations, circumstances, community, resources.</li> <li>▪ Narratives are socially situated, produced for a particular audience, in a particular context, and for a particular purpose; narrative is interactive, produced from the joint interaction of the narrator and the listener.</li> <li>▪ The researcher/inquirer is part of the story as they interact with participants to capture their stories within the natural context of their lives and work, as the inquirer develops interpretations of narratives and presents the stories given.</li> </ul> <p>(Chase, 2005; Clandinin &amp; Connelly, 2000; Polkinghorne, 2010; Riessman, 2008; Sfard &amp; Prusak)</p>

down in the culture at large and in the school system, and play a powerful role in schooling (Clandinin & Connelly, 1996). Importantly, teacher knowledge is a narrative construction composed in each teacher's life and "made visible" in their practice (Clandinin et al., 2006, p.4).

For this study, IEP development is viewed as a narrative construction, a multistoried process in a particular time and place on the school landscape. Capturing the individual and collective narratives of teachers in this process offers a way to understand their knowledge of IDD and special educational needs as a storied form, and in turn their meanings, conceptualizations, and practices in the work of IEP development. Teachers learn to talk about their practice in ways that accord with the official perspective and in a relationship of trust with the researcher, express their personal understandings and stories of experience (Elbaz-Luwisch, 2007). Understanding teachers' personal and collective narratives about the IEP process required consideration of the context of their work - the place, temporality, and sociality (Connelly & Clandinin, 1990, 2006), the wider institutional story, and "the embeddedness of the teacher in a school and school system and its mandated curricula, ideologies, pedagogical trends" (Elbaz-Luwisch, 2007, p. 359). I was capturing the individual voice of each teacher that articulated a single truth and a multiplicity of voices that I interpreted and portrayed as a collective narrative (Guba & Lincoln, 2005). At the same time, I sought "the voice that escapes easy classification" in that "all narratives tell a story in place of another story", and privilege one voice over another (Jackson & Mazzei, 2009, p.4).

My rationale for using narrative inquiry is further explained by authors who argue for narrative research in special education, inclusion, and disability studies (Avramidis & Norwich, 2002; Goodley & Tregaskis, 2006; Lawson et al., 2006; Rogers, 2002; Smith & Sparkes, 2008). Narratives play a pivotal role in shaping embodiment and individual lives in socially enabling and constraining ways (Smith & Sparkes, 2008). Clandinin and Raymond (2006) argue that “narrative inquiry can illuminate how disability is understood and lived out in social, cultural, and institutional narratives”; the stories of people with disabilities are composed and lived out around us in schools, shaped by contexts and narratives (p.101). Narrative inquiry is used with the view that “[p]eople shape their daily lives by stories of who they and others are” (Connelly & Clandinin, 2006, p. 477). “Much – perhaps most – narrative inquiry begins with telling ...the researcher interviews participants who tell..In most narrative inquiry work focused on telling, whether the interest is on stories told or on interpretations and meanings generated, the primary working methodology is the interview” (Connelly & Clandinin, 2006, p. 478-479). In this study, in-depth interviews were used to collect stories and accounts from interviewees as the narrators. As Chase (2005) points out, narratives “may be oral or written and may be elicited or heard during fieldwork, an interview, or a naturally occurring conversation” (p. 652). The researcher views each narrative as “a socially situated interactive performance” produced in a particular setting for particular purposes (Chase, 2005, p. 657). Each narrative is therefore understood as a joint production of the participant as the narrator and the researcher as the listener that arises in an interview setting in which certain questions are used “to invite interviewees to tell

about” their own realities and experiences (Chase, 2005, p. 657). Chase (2005) states that narrative researchers attend not only “to the stories that people *happen* to tell but also work at inviting stories...[in that] interviewees might not take up the part of narrator unless they are specifically and carefully invited to do so” (p. 661). Thus, Chase notes that narrative interviewing involves a paradox. On one hand, the researcher needs to be well prepared to ask good questions that will invite the person’s particular story while on the other hand, “the very idea of a particular story is that it cannot be known, predicted, or prepared for in advance” (p. 662). The researcher therefore prepares for narrative interviews by developing broad questions that specifically and carefully invite interviewees to tell their stories. Through narrative interviewing that included prepared questions to invite participants’ particular stories, there were many opportunities for teachers to tell their specific accounts of IEP development and students with IDD.

### **Research Sites and Participants**

The method of purposeful sampling was used which Patton (2002) describes as typical of case study methodology. The selection of teachers was based on their ‘fit’ with the research purpose and from whom I believed I would learn the most (Merriam, 1998). In that participants had to meet specific criteria, it was necessary for me to initially contact school administrators, school board special education consultants, and former colleagues to help in identifying potential school sites where there were teachers working with students with IDD. The criteria for selecting participants was as follows: (a) all participants were licensed to teach in Ontario, (b) all teachers were currently teaching a student(s) identified as an exceptional pupil under the Ontario Ministry of

Education category of exceptionality Intellectual: Developmental Disability, (c) all participants were responsible for the development and implementation of the IEP for the student(s) during the school year September 2013 to June 2014 (the period in which data was collected), and, (d) all participants had at least five years of teaching experience in Ontario. Five years of teaching was used to increase the likelihood that participants had experience in developing IEPs, were knowledgeable about provincial policies and school board guidelines related to IEPs, and had some experience working with other professionals such as community agencies. This criteria was seen as best for identifying teachers who would be able to reflect on their experiences, practices, and beliefs in developing IEPs for students with IDD and on their use of relevant documents.

A conscientious effort was made to select teachers from a cross-section of school boards representing larger and smaller urban and rural school districts as well as teachers from regular education and special education classrooms. Participants were deliberately diversified to avoid particular nuances of any one school board regarding the IEP process and/or its practices in educating students with IDD. In that I had worked in the education system in Ontario, every effort was made to recruit teachers who were unknown to me to ensure as much as possible that my insider position as a former educator did not influence how teachers responded during the interview process. At the same time, I saw my insider status as helpful in facilitating a sense of trust and connection between participants and myself because of the knowledge I brought to the research setting and my familiarity with the policies and practices of the school system in Ontario.

As school sites were identified, the principal was contacted and informed about the research. This was done prior to inviting a teacher to be a part of the study. All communication was done through emails and telephone conversations. On expressing interest in participating in the study, the Teacher Letter of Information and Consent Form was emailed directly to the teacher. [See Appendix C: Teacher Letter of Information and Consent Form.] Once a teacher consented to participate, the signed consent of the teacher was obtained and a convenient date and time arranged to visit the classroom and to conduct the interview with a confirming email sent to the participant.

In the process of recruitment, potential participants were personally contacted by email and telephone. Fourteen classroom teachers from three publicly funded English and English Catholic district school boards in southwestern Ontario participated in the study. Seven participants taught with District School Board A (A-DSB), three teachers were involved from District School Board B (B-DSB), and four teachers were recruited from one Catholic school board – District School Board C (C-DSB). All participants were licensed to teach in the province and were in good standing with the College of Teachers of Ontario (COT). The research sample consisted of twelve females and two males, between 30 and 60 years of age. Six teachers were working in regular education classrooms and eight teachers were teaching in self-contained special education classrooms. Differences in participant demographics related to differences in age, gender, teaching qualifications, number of years teaching, classroom setting and grade level, types of teaching experiences, school and school board demographics, and range

of experience in teaching or working with individuals with IDD. [See Appendix D: Participant Demographics.]

The research sample size is appropriate for meeting the criteria for data saturation given the purpose of the study. Guest, Bunce, and Johnson (2006) state that for research aimed at understanding “common perceptions and experiences among a group of relatively homogeneous individuals, twelve interviews should suffice” (p. 79). Lincoln and Guba (1985) state that saturation of themes can occur at twelve to twenty interviews. I considered the research sample to constitute a viable representation of teachers who were teaching students with IDD in Ontario’s public school system.

#### **Research Procedures: Data Sources**

Two main sources of data constituted the material collected and analyzed in this study. The primary data source was transcripts of interviews obtained through semi-structured interviews conducted with study participants (Fontana & Frey, 2005; Patton, 2002). The secondary data source was archival material in the form of Ontario Ministry of Education documents related to the IEP and individual school board documents available to the participants in the study. Interviewing participants and examining educational documents related to IEP processes produced material that was narrative in nature. Document texts were the source of written narrative material produced by others and not the research participants. Both these sources of data were supplemented by field notes taken during informal observations of participants’ classrooms. In keeping with the research focus on examining the oral narratives of participants and the narratives of document texts, a sampling of students’ IEPs was not used as a source of data.



### ***Classroom Observation***

A visit was made to each participant's classroom in order to become acquainted with the teacher and his/her classroom setting, and to collect field notes prior to the interview process. Patton (2002) points out that a key to gathering data is the collection of detailed and accurate field notes that describe the setting, activities taking place and the social interactions that occur. Each teacher was provided a copy of the Classroom Observation Guide. [See Appendix E: Classroom Observation Guide.] This guide outlined the purpose of my visit and the nature of my observational interests. Visits ranged in length from half a day to a full day. With the permission of the teacher, field notes were taken to record my observations and thoughts. For example, details about the classroom environment, number of students in the classroom, technology available in the classroom, and the presence of support personnel such as an Educational Assistant were noted. This information was used to help personalize interview questions, for recalling specific details that were potentially important for understanding participants' interview responses and/or for the analysis of interview data. Field notes were not used as data for formal analysis. This information also helped in establishing a sense of the commonalities and differences across classroom contexts that were potentially significant to the analysis of interview data.

### ***The Interview Process***

Face to face semi-structured interviews with the teacher participants were the primary means for collecting narrative data. This type of interview provided the amount of structure yet flexibility to elicit rich descriptions and narratives from participants. I

entered the research setting with the view that the interview process is a social practice in which I was interacting with participants to construct knowledge from the exchanges and accounts they gave in response to my questions and prompts. That said, I engaged in this process with the knowledge that interviews are active interactions between the researcher and the researched and are fundamental tools for gathering qualitative data which results in contextually-based outcomes (Creswell, 2007, 2009; Kvale & Brinkmann, 2009; Marshall & Rossman, 2011). This brought with it a responsibility for building trust and rapport so that participants would feel comfortable in sharing their true opinions and feelings.

By collecting data through individual in-depth interviews, I was given the opportunity to capture people's perspectives of an event or experience in their own words and to unfold the meaning of their experiences (Kvale & Brinkmann, 2009). Kvale (2007) describes the interview "as a construction site for knowledge" (p.7) that is used to understand, describe, and explain social phenomena 'from the inside' by accessing the thinking and experiences of people in their natural context. At the same time, Kvale (2007) and Brinkmann (2013) emphasize that the researcher needs to listen to what is 'said between the lines' and to follow different and sometimes contradictory meanings that emerge through the voices of interviewees. A critical insight for this inquiry comes from Smith (2005) who points out that interviews help "to unpack the very concepts and categories that people are accustomed to speaking from within a ruling discourse" (p.28) such as the macro level narratives embedded within educational documents.

Thus, through the interview process, I sought to gain an understanding of what happens to teachers that shapes or constrains their beliefs, practices, and experiences, and “to make visible the ways the institutional [school system] order creates the conditions of individual experience” (Smith, 2005, p.109). Bourdieu’s work offered the theoretical lens for this understanding given his attention to the interconnectedness between practice, habitus, field and social systems that produce or shape people’s lived experiences. I was able to be flexible in the type, format, phrasing, and order of interview questions and use a more conversational style of interviewing that created a climate of comfort and trust between participants and myself. Interviews were conducted between November 2013 and March 2014 and took place at a time convenient for the teacher and at a location in the teacher’s school. All interviews were conducted in English. Before commencing the interview, each teacher was given the opportunity to re-read the Teacher Letter of Information and Consent Form and to ask any clarifying questions. In most cases, interviews took place after school or during lunch periods and ranged in length from 60 to 90 minutes. All interviews were audio-taped in their entirety with the signed consent of participants.

An Interview Guide was developed and used to organize twenty guiding questions that provided direction for the interviewing process. [See Appendix F: Teacher Interview Guide.] All participants were interviewed using this guide. Interview questions consisted of open-ended questions revolving around preliminary topic areas and themes that related to the research questions and sub-questions. Questions were also framed according to Patton’s (2002) six types of questions that inquire into participants’

experience and behaviour, opinions and values, feelings, knowledge, background and demographics, and sensory experiences that concern specific data about what participants have seen or heard. Each teacher was invited to openly share their personal views and beliefs, and to reflect on their experiences in the IEP development process.

Each participant was permitted to withhold information, choose not to respond, withdraw from the interview or withdraw their interview from the research. None of the fourteen participants chose to withdraw from the interview process or not to respond to any questions. [See Appendix G: Ethics Approval Form.] To ensure I was capturing their responses accurately, I frequently repeated back to interviewees what I thought I heard them say. This gave each teacher the opportunity to clarify their comments and to elaborate if necessary. At the conclusion of each interview, participants were given the opportunity to add any final thoughts and were invited to contact me if they had any concerns or follow-up questions. Each teacher was reminded that a written report summarizing the study would be provided to their school board upon completion and successful defense of the research thesis.

All interviews were transcribed verbatim. Every effort was made to accurately represent the participant's voice and maintain the intended meaning. Text was kept as natural as possible and included noting the use of exclamations, pauses, emotions such as laughs, vernacular expressions, and repetitions to generate a verbatim account. Transcripts were securely stored in hard copy and electronically. One hard copy of the transcript was kept as a master copy and two working copies were used for the purpose of analysis. All participants were given a pseudonym to protect their privacy and to

maintain confidentiality of data. Each interview transcript was prepared in the same manner.

### *Review of Educational Documents*

The secondary data source for this study was the review of educational documents. Two document sources were used: Ontario Ministry of Education documents that included policy regulations and official descriptions of the IEP and processes for its development and implementation, and local school board documents that were taken to represent local directives regarding the IEP process as well as interpretations of Ministry policy information related to the IEP. [See Appendix H: List of Educational Documents.] Documents were collected in hard copy and electronically through Ontario Ministry of Education and school board websites.

Atkinson and Coffey (1997) describe documents as ‘social facts’ “which are produced, shared, and used in socially organized ways” (p. 47). As a qualitative research method, document analysis is particularly applicable to qualitative case studies to produce rich descriptions of an event, program, or phenomenon and to create rigorous and compelling research (Stake, 1995; Wickens, 2011; Yin, 1994). The review of documents was used to examine the conceptions and meanings of disability, exceptionality, special educational needs, and individualized education programs that were described and narrated, and as a result to understand how the substantive meanings about students with exceptionalities are foregrounded in these documents to identify them “as distinctly separate learners” (Martino & Kehler, 2007, p. 415). My interest was to also capture how these documents operate in directing teachers’ work in the IEP

development process and to note the interconnectedness of document narratives to those of teachers in actual IEP practice. For this study, the review of documents also helps (1) to provide data on the context within which study participants operate and background information and insight to contextualize data collected during interviews, (2) to suggest questions to be asked during interviews, (3) to provide supplementary data to interview data collected, and, (4) to track changes and developments in various documents in order to note how the research phenomenon progressed over time (Bowen, 2009).

### **Data Analysis Procedures**

Patton (2002) explicitly states, “Cases are the unit of analysis” (p. 447), adding that case analysis involves organizing data by specific cases for in-depth study and comparison. “The case study approach to qualitative analysis constitutes a specific way of collecting, organizing, and analyzing data; in that sense it represents an analysis *process*” for the purpose of gathering “comprehensive, systematic, and in-depth information about each case of interest” (p. 447).

I recognized that my initial analysis of the interview data began during the course of fieldwork (Merriam, 1998, 2009). During this research phase, insights and ideas about directions for analysis became clearer as data collection overlapped with how I began to think through my analysis of what was being said and heard. As I recorded insights during visits to participants’ classrooms and interviews while listening to teachers’ responses to my questions, I was thinking, for example, “How is this teacher defining IDD?” “Where does the teacher’s frame of reference come from?”, “What

message seems to be dominating the teacher's account of students' special educational needs for developing the IEP?"

The initial phase of analyzing interview data proceeded from field notes that included a description of the particulars of each case, observational and contextual information such as details about the classroom setting, background information shared by the teacher, certain practices and experiences described, and other information that I viewed as potentially important for analyzing data. This information assisted in my analysis by placing each individual participant into a particular time and setting which Patton (2002) describes as offering a translucent window into the larger social, cultural, and broader meanings from which the interpretations of data are made. Background information further helped in identifying the particular similarities and differences across teachers' narrative accounts that were used for drawing comparisons and identifying consistencies in the data.

A critical and constructivist perspective set the stage for looking at interview and document data, moving from raw data to abstract categories and concepts during the data analysis process (Merriam, 2009). The task of analyzing both sources of data was guided by the research purpose and questions, the literature reviewed, and the theoretical perspectives adopted in the study that were set out in the conceptual design of the study (Patton, 2002), as well as by analytical insights informed by my time in the field and by what I brought to the research because of my own experience in special education that positioned me as an insider doing research. In addition, Chase's (2005) five analytic lenses were helpful in directing my thinking about how I approached the analysis of

data: (1) expressing the narrator's point of view and highlighting the uniqueness of each human action and event; (2) emphasizing the what, where, and how in the narrator's voice, attending to what is communicated and how it is communicated; (3) viewing stories as enabled and constrained by social resources and circumstances as well as attending to similarities and differences across narratives; (4) viewing narratives as socially situated interactive performances that are produced jointly by the narrator and listener in a particular setting, for a particular audience and purpose; and, (5) viewing researchers as part of the story, developing interpretations and their own voice while constructing others' voices in narrating results.

Patton (2002) importantly notes that the foundation for qualitative data analysis and reporting is thick, rich description that takes the reader into the research setting. Following a case study approach, the process of analysis consisted of analyzing individual participant cases and "then the cross-case pattern analysis of the individual cases" as part of the data (Patton, 2002, p. 447). A fundamental step in the analysis was the development of categories and explanatory schemes as a means of providing a manageable way to describe the complexities of the interview and document data (Conchas, 1992). Conchas (1992) points out,

Those who embrace the qualitative orientation make public that which was previously maintained as private in the cognitive, social, and educational lives of the individuals studied...The "meaningfulness" of a given study does not reside "in the data" [and] categories do not simply "emerge" from the data. In actuality,



categories are created, and meanings attributed by researchers...who embrace a particular configuration of analytical preferences.... (p. 254)

Keeping in mind my case study and narrative approach to the analysis of data, I sought to discover personal and professional details that spoke to the meanings, practices, and issues involved in IEP development. For example, through content analysis of data, my interest was to examine the portrayal of students with special educational needs. In this sense my focus was on the narrative descriptions of students and the underlying beliefs and meanings associated with students who required IEPs as well as the particular frames of reference used. Through an interpretive approach, I was able to look at the narratives expressed as consisting of layers of meaning, some explicit and some hidden (Berg, 2009).

My pathway of analysis (Bazeley, 2013) involved an iterative and fluid process that involved reading and re-reading all transcripts and documents to gain a general sense and holistic perspective of both data sources. Moving back and forth between transcripts and texts, I looked for what was significant, making notes and identifying key points and ideas to construct the framework for my coding schemes. As I reflected on the information, I also looked for commonalities and connecting ideas across parts of the data. By identifying and interrogating these ideas, I began to establish preliminary categories and their subcomponents that would be used for creating a coding scheme. Working with a case approach, my inductive analysis included content analysis and the thematic analysis of the narrative accounts of individual participants and documents rather than an analysis of their linguistic forms. My analysis of content focused on

looking for core words, phrases, and passages while thematic analysis extracted information from the data to identify key patterns and themes (Patton, 2002). Narrative analysis was central to identifying how particular ideas, meanings, and perceptions of disability, IDD, special educational needs, and IEP development practices were being described and conveyed. My analysis also gave consideration to the audience for the research information and the kind of descriptive knowledge to be produced.

The coding approach taken to data analysis allowed for generating categories and themes based on coding by topic, analytical concepts, and descriptive coding related to participants' thinking and explanations. Codes were used as "organizing principles" to sort and order the data according to the type of data I was working with (Bazeley, 2013, p. 126), such as descriptive categories of data that represented setting or circumstances, actions and experiences, data related to topical issues such as challenges faced in developing IEPs, and conceptual data that was interpretive such as perceptions of special educational needs. An axial coding process further allowed for organizing case narrative accounts according to constructs that were shaped by interview questions and data based themes through which I was able to sort participants' narratives and responses to various questions. As each category was created, it was further defined by identifying subcategories to denote specific details about category components and criteria.

Coding categories were assigned names and corresponding alphanumeric codes to represent the category, subcategory and descriptor. For example, the category 'Teacher Background' (TCHBKGD) included the subcategories 'number of years

teaching’, ‘teaching qualifications’, and ‘classroom setting/grade level’. A few preliminary categories were introduced and named on an a priori basis by the researcher based on the research questions and interview topics addressed, the literature reviewed, and the knowledge that came from my teaching experience. For instance, in that the research literature identified collaboration as an issue in IEP development and was addressed during the interview process, the category of ‘Collaboration/Involvement of Others’ was used as an a priori category.

Two working copies of each interview transcript were used in the process of analysis. One copy was used to add comments and thoughts about the nature of ideas that were being revealed. The second copy was used for grouping sections of text onto sheets of chart paper that were labelled according to the coding scheme of categories, and research and interview questions. Following this stage of analysis, important sections of text were systematically sorted into file folders representing the final patterns and themes that emerged in the data which would be used to produce a metanarrative for that theme. In analyzing interview data, I kept in mind that the intentions and interpretations of both the study participants and myself as the researcher were the product of the interview exchange (Chase, 2005; Connelly & Clandinin, 1990; White & Drew, 2011).

While it was helpful at times to follow the participant’s lead as we engaged in the interview, the data elicited was, for the most part, the result of my power as the interviewer and the choice of topics addressed that produced the kinds of narrative data used for analysis. I approached the analysis of interview transcripts mindful of the need

to keep an open mind. “The interviewer must come to the transcript prepared to let the interview breathe and speak for itself” (Seidman, 2006, p. 100). To broaden my analysis of interview data, I further considered the nature of participants’ responses according to Patton’s (2002) typology of questions that had guided the formation of interview questions. For example, I considered individual accounts in terms of what they revealed about a teacher’s background, personal opinions, values, and feelings, knowledge and understandings, behaviours and actions, and experiences in IEP development.

To bring order to the analysis process, a codebook was developed that outlined the coding schemes generated to describe categories and subcategories for classifying data from both interview transcripts and document texts as well as to reduce the data to a manageable database (Creswell, 2009). Coding became a cyclical process with initial codes revised as the analytical work proceeded and categories were developed (Miles & Huberman, 1994). The development and refinement of key categories for the analysis of interview data was done with input from my thesis supervisor. As coding progressed, new categories and subcategories were added while others were eliminated, condensed or revised, taking into account notable associations between categories and groups of data. Data that did not fit an identified category or that reflected inconsistencies, conflicts or contradictions in the narrative material were also noted and coded for later consideration. [See Appendix I: Coding Scheme for Narrative Analysis of Educational Documents and Appendix J: Coding Scheme for Analysis of Interview Data.]

This integrated process of analysis uncovered the practical understandings of participants, the patterns of teachers’ activities in the context of IEP development, how

teachers came to understand things such as special needs for developing IEPs, and the dimensions and particularities of the meanings, messages and language used that were revealed in the narrative data. The patterns and themes captured thus came from my effort to “listen to the words of the text” and statements made that were provided in the narrative accounts examined. I continually reflected on what my research questions asked of the data in order to identify the information needed and to question the data to extend the boundaries of the categories for a more in-depth analysis. For instance, I asked “How did teachers talk about involving others in the development of IEPs? What did they include and what did they not include?” “What was the dominant message being conveyed in the text passage?” As analysis proceeded, key sections of text and significant quotations were identified and highlighted. A participant summary form was developed as a case record for each individual teacher participant using the teacher’s pseudonym as well as a document summary form completed for each document reviewed. [See Appendix K: Individual Participant Summary Form: Illustrative Example and Appendix L: Document Review Form: Illustrative Example.] Information recorded included key quotations, ideas, and concepts used to create an overall narrative of findings from both sources of data.

My analysis of educational documents focused on understanding how students in special education and special educational practices such as IEP development were talked about on an institutional level and “the networks of power that enable certain voices to be heard and listened to” (Wickens, 2011, p. 152). I employed document analysis as a way to uncover the macro institutional narratives that conveyed particular ideological

beliefs, forms of power, and assumptions about students with exceptionalities under which teachers operate in the IEP development process. My analysis further involved looking at the type and purpose of the document, its voice in terms of authorship, its historical and political context, and the nature of the terminology and expressions used and repeated.

Bowen (2009) points out that the “rationale for document analysis lies in its role in methodological and data triangulation” (p. 29). He notes that documents are stable and unaffected by the research process in that the researcher is not an issue in the construction of texts and meanings, such as in constructing data through interview interactions. Bazerman (2006) states that the analysis of educational documents provides a way to examine texts that frame school policies and impact on classroom practices, and to uncover the propositional content and assumptions that these texts incorporate. He notes that the key to understanding text analysis “is to see that texts are parts of actual social relations – written in specific circumstances at specific times and read in specific circumstances at specific times...texts mediate meanings and actions between people” (pp. 77-78).

I approached my analysis of documents by considering their substantive content and their discourses that mobilize teachers’ viewpoints and perceptions, that frame their understandings and work. My approach combined elements of content and thematic analysis that were used in the analysis of interview data. Analysis began by identifying and grouping together relevant documents authored by the Ontario Ministry of Education and those by local school boards. Each document was identified according to

its purpose, such as policy or guideline, and located according to the political and educational context of its production. This was important to contextualizing the purpose and function of the document as well as the author's voice and authority communicated. Procedures for analysis were similar to those used in the analysis of interview data, determined according to the particular information I wanted to know. For example, I asked questions about the meanings inscribed in texts that represent views about exceptionality and disability, disability-associated imagery, assumptions about the educational needs and struggles of students with exceptionalities, educational outcomes identified or desired for these students, and teachers' roles in IEP development.

The coding scheme developed for the analysis of documents (Appendix I) was also informed by looking at the categories generated in the analysis of interview transcripts. For instance, codes representing the category 'Student Knowledge Source' (STKNOW) and 'Collaboration/Involvement of Others' (COLLAB), were applicable to both data sources. Passages of text were highlighted and colour coded manually with notes entered alongside the passage to mark significant sections of text. Thematic analysis was used as a form of pattern recognition within the data (Bowen, 2009) with reiterating patterns in texts identified to establish recurring central themes that emerged. I continually checked category codes to identify concepts that seemed to go together and for comparing document data with interview data by asking, "How is this narrative text similar to or different from interview texts?", "What viewpoints or ideas are being expressed in both data sets?"

### *Bringing Closure to Data Analysis*

Identifying associations between categories was important for decision making about my final coding schemes. This ensured that all data related to particular codes, patterns and themes were identified and represented. Associations between categories and themes became important for formulating my research findings. For example, in the analysis of interview data, the category 'Teacher Background' was associated with groups of data related to the theme of personal factors that concerned the participant's teaching qualifications, teaching experience, sense of teacher efficacy in terms of knowledge and skills and sense of self-reliance or faith in self for developing IEPs. This information was significant for responding to the research question that asked about factors influencing teachers' beliefs and practices in IEP development. Analyzing the associations between categories gave depth to my analysis as I looked at the extent that a category existed across interview transcripts and document texts as well as the extent a category linked to or how it varied from other categories (Bazeley, 2013).

Instances of a category were coded until I believed there was sufficient evidence of the category and associations and no new categories or themes were emerging. To bring closure to the process of analysis, I looked for redundancy in the categories to establish the key themes that emerged from the regularities in the data. Once it appeared that my analysis had captured enough comprehensive information about the things going on in the data, I considered saturation had been reached. Analytical findings about key patterns and themes were then summarized in light of how this information responded to my research and interview questions. A cross-case pattern analysis was conducted "to



generate cross-case themes, patterns and findings” (Patton, 2002, p. 452) for interview data collected from participants. A similar process was used to look at patterns and themes across educational documents. During the final phase of data analysis, thematic summary charts were prepared in order to summarize key themes represented and to integrate analytical findings. This process was used to develop a holistic narrative of the IEP development process as it operates in schools and the ways that students with IDD are storied in classrooms through this process.

### **Researcher Reflexivity**

My personal story in Chapter 1 offers insight into how I came to the research problem investigated and the vantage point from which I engaged in the study. As the researcher, it is my responsibility to report personal and professional biases (Patton, 2002, p.566). Merriam (2009) points out that the human research instrument “has shortcomings and biases that might have an impact on the study. Rather than trying to eliminate these biases or “subjectivities,” it is important to identify them and monitor as to how they may be shaping the collection and interpretation of data” (p.15). I was continually mindful of how I was uniquely positioned as the researcher because of my insider position as a former special educator. How I looked at the data was determined by the way I viewed the information while recognizing the partiality of my own understandings and interpretations (Richardson, 2000). While my interest was on understanding teachers’ narratives that revealed their beliefs and practices in IEP development for students with IDD, I was challenged to reflect on my own perspectives that had influenced my practices as an educator and this research work. By bringing

reflexivity into the research, I remained constantly aware of my values and contentions that led me to the research topic and shaped the actions I took in conducting the research.

Importantly, awareness that comes from researcher reflexivity minimizes the effects of personal bias and is a necessary component of Bourdieu's theoretical method (Grenfell, 2008). During the interview process, I realized I had a fundamental role in shaping the interview data generated that would be analyzed, interpreted and presented (Fontana, 2003; White & Drew, 2011). Clandinin (2007) views the researcher and study participants as operating within larger cultural, social, and institutional narratives. The narratives expressed by teachers, educational documents, and myself as the researcher were seen as situated within these broader narratives. I continually reflected on and asked myself "of what story or stories do I find myself a part" (McIntyre in Kraus, 2006, p. 108). This reflexive gaze brought with it an appreciation of how the research was potentially changing me, my sense of who I had been as an educator, who I was as a researcher, and who I would become.

### **Ethical Considerations**

In that this study involved conducting research with humans within the public institution of the school system, I was morally and ethically bound to conduct this research in a manner that continually considered the welfare and benefit of research participants, that protected their privacy, minimized risk, and avoided putting participants or their students into any vulnerable or sensitive situation. The ethical choices made based on the research design concerned procedures followed in the

gathering, analyzing, interpreting and reporting of findings, obtaining informed consent, guarding participants' confidentiality, and honoring the rights of research participants. In using case study and narrative inquiry approaches, ethical considerations permeated the research setting, shaped my responsibilities as the researcher, my interactions with study participants, the kinds of questions I asked of them, and how I went about transcribing, analyzing, and writing research texts that came from the data. "Every aspect of the work is touched by the ethics of the research relationship" (Josselson, 2007, p. 537). Clandinin (2007) points out that narrative inquiry "is a profoundly relational form of inquiry" in which attending to ethics is ongoing and a present part of doing narrative research (p. xv). As a qualitative researcher, I remained attentive to the protocols set by Western University for conducting research with humans, to school board requirements for doing research within their schools, and to the professional standards of the College of Teachers of Ontario in that I, as well as the research participants, were active members of the College. These standards include demonstrating mutual respect and maintaining professional conduct during all interactions and communication. Ethical considerations related to the review of educational documents centered around how these documents might impact on teachers who use them (Marshall & Rossman, 2011), and to how my analysis and writing about these documents might violate those who produced them and the intent of the information conveyed.

### **Issues of Soundness, Credibility and Trustworthiness**

From the standpoint of this researcher, findings are credible and accurate, and clearly respond to the research questions asked. I conceptualize trustworthiness and soundness or validity of the research by drawing on Lincoln and Guba's (1985) constructs of credibility, dependability, and transferability. Their notion of the "truth value" of the study helps to frame the constructs for soundness and credibility of this research as an interpretive inquiry. My self-reflective narrative that was presented earlier in the thesis clarified my bias and perspectives to make transparent what I brought to the study as the researcher because of my teaching experience. In seeking to establish the trustworthiness of the study, reflexivity was a critical element for controlling potential biases throughout the research process.

I note the use of triangulation of data collection methods to enhance the credibility of the research. By drawing on two data sources – teacher interviews and document reviews that were supported by detailed field notes in the analysis and interpretation of data, a triangulation of data was created to make the research findings robust and to offer converging lines of evidence (Yin, 2006) that speak to teachers' meaning making and work in developing IEPs for students with IDD. Feedback was also solicited from professional colleagues who were unfamiliar with the research settings and participants to challenge my understanding of data. Initial coding schemes were discussed and revised with input from the thesis supervisor to establish clarity in categorical understandings for analyzing interview data. Consistencies in the data were

evidenced through the application of consistent coding schemes and pattern analysis. At the same time, inconsistencies were not eliminated but noted.

Detailed information regarding the background of the research, the selection of research sites and participants, the rationale for the research design, and methods for data collection and analysis were clearly defined to give credibility and trustworthiness to the study and its findings. Further, procedures were carefully followed to increase the dependability or reliability of research findings. For example, in conducting interviews, the Teacher Interview Guide was used in the same manner for all participants other than a few adjustments to the order of questioning in order to follow the lead of the participant. Notes taken during observation in classrooms and during interviews were purely descriptive and not judgmental or evaluative. Further, the research issue was clearly identified and described by situating the study within the relevant literature, a sound theoretical framework, and the personal experience of the researcher.

The issue of transferability of research findings is important to the soundness of this study. I believe the research problem, data sources, research results and conclusions drawn are transferable to teachers working in similar classroom settings in Ontario as the teacher participants in this study. Although a limitation of the research may be argued on the basis of the size of the study sample, as previously pointed out this sample size is considered appropriate to the qualitative research methodology used. Other researchers may choose to apply these findings to different classroom settings or student populations of interest that they view as similar enough to warrant this application. The transferability of findings from this study rests on how the researcher approaches the

investigation and determines whether or not the findings of this study can be transferred to other classroom contexts and students.

### **Chapter Summary**

This chapter outlined the research methodology used in doing this study and the procedural methods followed for collecting and analyzing data. Qualitative research was presented as a methodology that allows for researching and understanding people's meanings, beliefs, practices, and experiences in the real-life context of their work. A description of case study and narrative inquiry was presented with a discussion of the blending of these approaches to explicate their interconnectedness and how both approaches were most appropriate to the research purpose and questions. Semi-structured interviews and educational document reviews were described as the sources of narrative data collected. This was followed with an account of procedures used in the analysis of interview and document data. The place of researcher reflexivity was also discussed. Finally, ethical considerations and issues of research soundness, credibility, and trustworthiness were addressed. In the next chapter, I present my research findings that came from the thematic analysis of educational documents and interview transcripts.

## Chapter 5

### Research Findings

*Stories are data with a soul.*

(B. Brown, 2012, p.252)

#### Chapter Overview

In this chapter, I describe my research findings that address the original research questions for the study (see Chapter 1). My research aim was to examine the prevalent everyday narratives that currently shape and direct IEP development for children with IDD. Through narratives, I sought to uncover the normalized discourses that are largely accepted and used by classroom teachers to (re)conceptualize students' identities within the IEP process and the nature of school programs that result. Using content (Hsieh & Shannon, 2005), thematic and relational analytical approaches (Bazeley, 2013), findings are based on data collected from in-depth interviews with classroom teachers and from the review of educational documents relevant to the IEP process in Ontario.

Research findings are described according to the key interrelated themes identified in the data and are presented as my evidence for how my five sub-questions for the study might be answered (Bloomberg & Volpe, 2012; Creswell, 2009; Patton, 2002; Stake, 1995, 2005). In looking at the data as a qualitative researcher, I considered the similarities and differences in circumstances and contexts of study participants, taking into account what these commonalities and differences might mean (Bazeley, 2013) to teachers' thinking and practice in the development of the IEP. In that this was an instrumental and collective case study, findings reflect the personal narratives of

individual teachers as well as the collective understandings, experiences and practices of teachers that were revealed through my consolidation of participants' responses.

The chapter is organized into two sections. First, I present the research findings that came from my review of educational documents. Second, I take up interview findings as they pertain to the research sub-questions. Quotations and text excerpts are used to "provide an opportunity for the reader to enter into this study and to better understand the reality of research participants" (Bloomberg & Volpe, 2012, p. 155). Pseudonyms are used in all cases in the interest of confidentiality of school boards and teachers. References to documents from participants' school boards are distinguished by citing the source as *District School Board A* (A-DSB), *District School Board B* (B-DSB), and *District School Board C* (C-DSB). However, given the public nature of government documents, these materials are noted as authored by the Ontario Ministry of Education.

## **Section I: Educational Documents**

### ***Setting the Context: Educational Documents as Institutional Discourses***

Research findings from educational documents are significant to this study for two main reasons. As Bloomberg and Volpe (2012) point out, documents themselves are aspects of the educational environment or context in which teachers work that include policies, procedures, institutional culture, vision, and organizational structures.

Secondly, the review of documents helps to uncover the macro-level institutional discourses as the language in use that is potentially recycled (Souto-Manning, 2014) in the everyday narratives of teachers and which in turn, informs and influences their



thinking and practices. Hence, findings from documents illustrate the extent of provincial government and local school board hegemonic discourses that control the IEP process and that are seen as pivotal to shaping teachers' actions and perceptions of students with special educational needs and the IEP. I note that discourse is considered to be an inherent part of the social context and is understood here to mean "an interrelated set of texts...that brings an object into being" (Phillips & Hardy, 2002, p. 3) such as the IEP or the student who requires an IEP. Importantly, when looking at document findings, it is helpful to understand that teachers are generally obligated to be the receivers of institutional discourses and are accustomed "to being colonized" by these discourses that dictate their actions (Souto-Manning, 2014, p. 173).

The specific documents chosen for study were the most recent documents available at the time of data collection. I considered these materials to sufficiently demonstrate the prevailing institutional narratives related to the IEP process in Ontario. These documents include: *The Individual Education Plan: Standards for Development, Program Planning, and Implementation 2000, Ontario Ministry of Education* (referred to as the IEP Standards document); *The Individual Education Plan (IEP): A Resource Guide 2004, Ontario Ministry of Education* (referred to as the IEP Resource Guide 2004); *Regulation 181/98, The Education Act of Ontario, Government of Ontario*; *A-DSB Special Education Report/The Individual Education Plan*; *B-DSB Special Education Report*; and the *C-DSB Mission Statement and Special Education Report*. Through the use of the document summary form to note key content, terminology and illustrative passages of text (Appendix L), materials were reviewed and compared that

led to establishing six core themes that were found to apply to all documents. These themes are identified in Table 2. The visible content of texts in terms of the use and repetition of particular words, phrases and expressions were linked to the core concepts and context areas in the data (Hsieh & Shannon, 2005; Patton, 2002; Rogers, 2011).

### **Key Findings**

Findings from documents are considered in light of how they contribute to answering my research sub-question, *“In what ways do educational documents related to the IEP influence teachers’ work in the IEP development process?”* Essentially, these findings help to put into context the nuances and complexities of teachers’ narratives, providing insight for looking at how teachers’ personal accounts might be tailored to broader educational discourses. The six major themes in Table 2 are presented as my evidence of findings dealing with the meanings and forms of narratives constructed in institutional documents and include ideas that were found to be both obvious and pervasive as well as ideas and connotations that were more subtle, inferred or symbolic. For instance, all documents clearly communicated that the IEP is an educational tool for the teaching and learning of students identified as exceptional learners. On the other hand, texts made inferences about the other kind of student who might require an IEP without offering any discernible circumstances other than to suggest it was due to pupils’ special educational needs. Thematic findings are addressed as follows.

#### a) *Context of Document Production*

Findings that speak to the contextual framework of each document relate to the primary focus and purpose of the publication, its authorship, format, intended audience,

Table 2. Overview of document coding categories and related organizing themes

<b>Analytical Category &amp; Sub-categories</b>	<b>Code</b>	<b>Organizing Theme/ Concepts</b>
Document Context/ Policy Environment <ul style="list-style-type: none"> <li>- Document Type</li> <li>- Purpose/Function</li> <li>- Audience/Recipient</li> <li>- Authorship/Origin</li> <li>- Intended Focus</li> </ul>	CNTXT	Context of Document Production
Ideology/Explanatory Discourse <ul style="list-style-type: none"> <li>- ethical/moral</li> <li>- legislative/rights</li> <li>- logical/rational</li> <li>- emotional</li> </ul>	EXPDIS	Explanatory Argument of Document
Conceptualization/Classification <ul style="list-style-type: none"> <li>- disability/exceptionality</li> <li>- student characteristic</li> <li>- special educational need</li> <li>- special education purpose</li> <li>- individualization</li> </ul>	CONCPT	Conceptualizations and Representations
IEP Development Process <ul style="list-style-type: none"> <li>- educator expertise</li> <li>- student information source</li> <li>- goal setting</li> <li>- partnerships/collaboration</li> <li>- IEP management</li> </ul>	IEPDEV	IEP Development Process
School Board and School Culture <ul style="list-style-type: none"> <li>- roles and responsibilities</li> <li>- supports and resources</li> <li>- leadership</li> <li>- collective beliefs</li> </ul>	SCH/BDCULT	Culture of School and School Board
Collaboration/Involvement of Others <ul style="list-style-type: none"> <li>- inter-professional collaboration</li> <li>- parent/family collaboration</li> <li>- student collaboration</li> </ul>	COLLAB	Collaborative Practice

and its major premises. The context or policy environment of educational document included regulatory legislation (Regulation 181/98), prescriptive policy texts (the IEP

Standards 2000), guidelines (the IEP Resource Guide 2004), and informative school board special education reports available to the public. In that the purpose of the IEP Standards document is to govern the IEP process in schools across the province, its format is best described as prescriptive with its intent being to establish the foundation for school board practice. This document thereby aims to bring consistency to IEP development and implementation across schools. I came to see that the IEP Standards document was an inseparable part of the discourse of other texts and purposefully communicated powerful ideas and propositions regarding students with special educational needs and the IEP process in order to convey the authoritative voice of the provincial government. Thus, it was found to have a dominate voice in the production and content of educational documents produced at the level of local school boards as well as in the production of other government publications such as the IEP Resource Guide 2004. To illustrate this authority, the document makes use of strategic reference to Regulation 181/98 of the Education Act of Ontario to illuminate its power and influence on establishing the procedural and behavioural expectations for educators when developing the IEP. For instance, the regulatory context of the Standards document is illustrated by the following passage:

This document describes new, province-wide standards that school boards must meet when developing, implementing, and monitoring Individual Education Plans (IEPs) for exceptional students, in accordance with Regulation 181/98 of the Education Act....Each section of the document identifies for school boards and principals the purpose of the standard described in the section,

the requirements to be met in achieving the standard, and the criteria according to which compliance with the standard will be assessed by the Ministry of Education. (p. 3)

Looking at the similarities of meanings and terminology across all materials, I came to consider that school board documents functioned as supporting texts and local interpretations of Regulation 181/98 of the Education Act of Ontario, the IEP Standards document and the IEP Resource Guide. As a result, school boards demonstrated their compliance to government directives by drawing on the same premises, ideas, and terminology to steer the thinking and courses of action of educators. In addition, messages of accountability appeared to be incorporated into each document. For instance, much of the message conveyed in school board special education reports seemed to be aimed at clarifying the board's vision of special education, its commitment to providing special education programs and/or services, and its responsibility for ensuring specific procedures were followed. Importantly, a key notion articulated was that schools and school boards were accountable for the development and implementation of the IEP.

b) *Explanatory Argument of Document*

This major theme encapsulates the underlying explanatory argument used in documents to explain the intent of the IEP, its rationale and its role in special education provision. The broad political and educational rationality to emerge throughout all documents implies that the IEP process is the most logical and reasonable means through which educators are able to negotiate educational planning for students

requiring special education and to mitigate student difference in order to reduce educational disadvantage. Ethical, logical, and moral arguments replicated in texts further suggest that the IEP process is in keeping with the need to focus on the individual through the ‘individualization’ of services and supports as posited by the Ontario Human Rights Code. This argument asserts that people “with disabilities should be considered, assessed, and accommodated on an individual basis” (IEP Resource Guide, 2004, p. 4). Adding to this perspective is the shared sentiment that the IEP is developed in the best interests of the student and is therefore an ethically bound process that it recognizes and assures the rights of students to receive an appropriate education in keeping with their specific needs.

An example of this thinking is reflected in the IEP Standards document that proposes the IEP process provides a principled approach to resolving the issue of educating pupils with exceptionalities or special needs so that these students are able to learn. It states that the IEP “identifies learning expectations that are modified from or alternative to the expectations given in the curriculum policy document...and/or any accommodations and special education services needed to assist the student in achieving his or her learning expectations” (p. 3). This contention is further expressed in the statement that the “IEP reflects the school board’s and principal’s commitment to provide the special education program and services” necessary to meet the identified strengths and needs of the student within the school board’s available resources (p. 4).

The special education reports produced by two school boards (A-DSB and B-DSB) reiterate these ideas in their explanation of how the IEP process is to function

within each respective board. Both reports refer to the IEP as a major component of special education provision, sharing similar overarching premises upon which an IEP is to be developed. The report from B-DSB tends to suggest that because of the IEP process, students are assisted in reaching their academic, physical, social and emotional potential since the focus is placed on the specific needs of the individual learner. This report goes on to state that given the demands for special education programs and services placed on school systems by society and through government legislation, and given the apparent increase in the level and complexity of students' needs, the school system is responsible for developing educational programs based on the special needs of learners. Similarly, the C-DSB report extends this argument by stating that the school board's model for special education includes the provision of individualized educational programs through which students' learning and educational experiences are made relevant, effective, and achievable. The contention presented is that the individualized program ensures that instructional practices are in keeping with the individual abilities, needs, interests, and learning styles of the student.

In sum, it appears that all documents present the same arguments to explain the purpose and reason for the IEP, drawing on similar narratives to render the IEP as the most beneficial working tool for meeting the special educational needs of students. Moreover, these arguments portray the IEP process as a rational one through which the school system works to ensure school programs, services and supports are made appropriate to the individual circumstances of the student in order to bring about his or her successful learning and participation.

c) *Conceptualizations and Representations*

When looking at the ways in which individualized education, exceptionality, and special educational needs were conceptualized in educational documents, it was apparent that the repeated use of specific terms and expressions was employed to induce consistent conceptualizations and understandings. Explicit descriptions of the student for whom an IEP is required were consistently employed in Ministry of Education publications. These descriptions were seen to evoke similar conceptualizations in documents from school boards. Therefore, my analysis of the data indicates an inherent and inseparable connection between the ways in which school board materials and Ministry of Education documents construct and define the identity of the student for whom an IEP is developed. This was particularly applicable to students designated as exceptional pupils through the IPRC process. For example, the IEP Standards document, as a regulatory text, stipulates that an exceptional pupil is a student whose exceptionality “must also accord with the categories of exceptionalities and the definitions provided in the Ministry of Education’s memorandum to Directors of Education and School Board Authorities dated January 15, 1999” (p. 6).

The dominant narratives across documents direct teachers to attend to the observable characteristics of the student that are associated with difference and difficulty. For instance, the IEP Standards document goes on to state, “a description of the student’s exceptionality” must be in accordance with Ministry approved categories of exceptionalities. Particular descriptors of the exceptional student are used to inform educators’ conceptions of pupils who require an IEP. The Standards document thereby



stipulates that the teacher is to make certain that the IEP is based on “a clear description” of the student’s characteristics that are supported by relevant assessment data (p. 7). This narrative provides evidence of how the pupil is constructed as a certain type of student with a specific identity and way of being in the classroom that warrants the development of an IEP.

I found that all documents were inclined to emphasize the weaknesses and difficulties of the pupil as the basis for the IEP and, as a result, for conceptualizing the nature of the individualized educational program. Not infrequently, it seemed that the viewpoint taken of the student requiring an IEP was continually juxtaposed with the learning and productivity of ‘regular’ students without exceptionalities or difficulties in learning. As I examined each document, I felt that the overriding narrative strongly linked conceptions of students and special educational needs with a deficit-based perspective that focused on individual deficiencies or lagging skills in learning and productivity. I came to suspect that the expression “special educational needs” was consistently being used to refer to weaknesses, deficiencies or deficits that “affect the student’s ability to learn and to demonstrate learning” (The IEP Resource Guide, 2004, p. 4-6). A number of analogies and metaphors appeared to be used to describe students’ needs in relationship to deficiencies that were correlated with the risk of educational failure. For example, the IEP Standards document states it remains the characteristics of the pupil that necessitate and justify the IEP regardless of whether or not the student has been classified as an exceptional pupil. The all-encompassing narrative describes these students as those who have “unique educational needs” (p. 8) that interfere with

learning. In keeping with the institutional discourse of Ministry of Education publications, school board documents tended to put forward the premise that special educational needs meant something separate or different from abilities or strengths. For instance, choice of wording in documents typically alluded to needs as being unique and special. Within these narratives, various phrases such as ‘the special needs of the student’, ‘the characteristics of the student’, ‘students with special needs’, ‘identified needs’, ‘the situation of the student’, and ‘the student’s unique educational needs’ were applied to clarify the concept.

In turn, my findings suggest that these ideas connected with premises about the nature of the individual educational program. Based on the apparent consensus across documents about the IEP and the student with special educational needs, it appeared evident that educators were to employ common understandings of these constructs. To put this into perspective, the IEP Standards document constructs the student and the individual school program in this way:

An IEP *must* be developed for every student who has been identified as an “exceptional pupil”...in accordance with Regulation 181/98 [and]... *may* be developed for a student...who has been deemed by the board to require special education programs or services in order to attend school or to achieve curriculum expectations and/or whose learning expectations are modified from or alternative to the expectations set out...in a provincial curriculum policy document. (p. 5)

A comparable narrative is used by the A-DSB report to transmit the notion that students with IEPs have unique patterns of learning that are different from their peers and that

necessitate the provision of tasks that respect the students' inabilities and skill levels. For this reason, the individualized program is designed to assist the student to develop his or her maximum potential in the cognitive, affective (social/emotional/behavioural), and psychomotor domains of learning.

The visual content of documents shows that specific words and phrases are also repeatedly employed to explain the IEP. The IEP Standards document states:

An IEP is a written plan describing the special education program and/or services required by a particular student. It identifies learning expectations that are modified from or alternative to the expectations given in the curriculum policy document for the appropriate grade and subject or course, and/or any accommodations and special education services needed to assist the student in achieving his or her learning expectations...The IEP is *not* a daily lesson plan itemizing every detail of the student's education. (p. 3)

Recognizing how Regulation 181/98 and the IEP Standards document operationalize the meaning of the IEP, school board documents tended to repeat similar explanations. For example, the B-DSB report describes the IEP in the following way:

An IEP is a written plan describing the special education program and/or service and supports required by a particular student. It is a working document that describes the strengths and needs of an individual exceptional pupil, the special education program and services established to meet that student's needs, and how the program and services will be delivered....It should identify specific goals and expectations for the student, and should explain how the special

education program will help the student achieve the goals and expectations set out in the plan.

This report incorporates various terms to refer to the IEP, describing it as a written plan, a working document, a plan, an ongoing record, a tool, and a summary of a student's strengths, needs, and expectations for the student's learning during the course of the school year. As in the B-DSB report, the Special Education Report of the A-DSB aligns its definition of the IEP with that of Regulation 181/98 and the IEP Standards. It states:

An Individual Education Plan (IEP) is a written plan. It is a working document which describes the areas of strengths and needs of the individual student. It is not, however, a description of everything that will be taught to the student. It is a summary of the expectations for a student's learning during a school year...an IEP is developed for each student who has been identified as exceptional...IEP's may also be prepared for students who require modifications, accommodations and/or alternative programs, but who have not been formally identified as exceptional.

Thus, the strategic use of recurring ideas, terminology, and expressions reveals the power discourses used by educational documents to direct how teachers and others involved in the education of the student are to conceptualize and understand exceptionality, special educational needs, and the IEP process itself.

d) *IEP Development Process*

This theme captures the process of IEP development and involves the dimensions of intended practices for educators. In that the intent of the IEP Standards

document is to regulate the thinking, behaviour and actions of school personnel in the IEP process, it identifies specific pedagogical procedures and expectations for professional practice. Along with Regulation 181/98 and the IEP Resource Guide, the IEP Standards document outlines procedural components to be followed in the planning, development, and implementation of the IEP organized according to certain phases of practice. Foremost are practices related to identifying circumstances under which an IEP is developed, the roles and responsibilities of school administration and teaching staff, and procedural steps for planning and developing the IEP. See Appendix B: Components of Individual Education Plan Process. Thus, specific actions are identified to ensure that the professional practices of all school personnel are consistent with and in compliance to those outlined in government policy. With regards to professional practice, the IEP Standards document states that teachers:

- (i) use a variety of information sources about the student in developing the IEP,
- (ii) conduct ongoing assessment of students to evaluate progress in the achievement of IEP goals and expectations,
- (iii) collaborate with parents, school staff, the student, community agencies, and other stakeholders in developing the IEP, and
- (iv) make decisions about curricular content based on the identified needs of the student.

Importantly, local school board documents repeated these courses of action and expectations for practice while attempting to acknowledge the particular local

circumstances of the school board itself. As a result, despite any differences across district school boards such as differences in demographics or school board philosophy about special education provision, local documents tended to replicate the same premises and procedural components as those conveyed in government materials. For instance, school board reports described the roles and responsibilities of school staff, types of student information to be used, and specific practices to be followed including collaboration with others such as parents. Together, it appeared that each document attempted to portray IEP development as a systematic institutional process that operated within the culture of the school and school board. For this reason, I now present document findings that speak to the theme of school and school board culture.

e) *Culture of School and School Board*

The institutional culture of the school and school board emerged as a significant explanatory theme found within the prevailing discourses of documents. This theme moves the conversation about the IEP from one that is focused on the individual student to narratives that concern external factors related to the IEP process. In reporting my findings, the term 'culture' is used to mean the educational context in which teachers, school administrators, and others work and in which the development of the IEP takes place. Culture is taken to refer to the social and organizational forces that create the visible product of the IEP as well as the beliefs, values and observable practices of educators. Through this theme, I was able to consider how the narratives expressed in documents interwove IEP development with the organizational structures, circumstances, and beliefs that made up the culture of the school and school board.

Overlapping components of this theme recognized in the data included narratives about school leadership, the responsibilities of school personnel, the overarching beliefs, values, and principles guiding the IEP process, and the range of collective practices denoted with respect to how educators were to act.

In relationship to leadership and the roles and responsibilities of school personnel, the IEP Standards document describes the responsibilities of school personnel. Further, it explicitly shifts power to school administrators and clarifies the weight of the principal's role by stating it is the duty of the principal to create a collaborative and supportive school culture in which the IEP process operates. It further states that the principal must make sure all school personnel adopt a common or collective understanding of the student, the students' needs, and how the needs and strengths of the pupil are to be met. As an example, the following narrative strongly suggests how the principal is to exercise power through distributing responsibilities to school staff:

The school principal, who is responsible under Regulation 181/98 for ensuring that an IEP is developed for each student who has been identified as exceptional, is also responsible for ensuring that the IEP is developed collaboratively by school and board staff members who are familiar with the student and who, as a team, possess the knowledge and qualifications necessary to develop the most effective plan possible for the student...In elementary schools, the principal or vice-principal is expected to coordinate and oversee the work of the special education team, which may include the special education teacher, the classroom

teacher, the teacher-advisor, and support staff, in developing, monitoring, and reviewing each student's IEP. (IEP Standards 2000, p.18).

In this passage, the distribution of responsibilities may be seen as an organizational technique used to create specific spaces (Gore, 1995) for the participation of school staff.

Interestingly, although the IEP Standards document alludes to the importance of classroom teachers in the IEP process, the professional qualities of teachers are implied but not specified. A confusing statement found in the document is in reference to the school or IEP team in that the narrative creates a sense of ambiguity about the role of the teacher. While clarifying that the principal oversees this team, and acknowledging the importance of the teacher, the document states that "the special education team may include the classroom teacher" (p. 18). This seems to suggest that despite the responsibilities assigned to the classroom teacher, the principal has the discretion to determine the teacher's level of involvement in team meetings concerning a student's IEP. At the same time, the responsibilities and compliance of teachers, in accordance with the Education Act of Ontario, are insinuated with respect to expectations for their behaviour and practices to be followed as put forward by this government document.

#### f) *Collaborative Practice*

I came to recognize a major recurring theme revealed across documents was that of collaborative practice and the involvement of others in the IEP process. This theme primarily included dimensions of practice that included working in partnership with others, especially parents, colleagues, and other professionals. All documents spoke of



collaborative practice as an important component of the IEP process. The following passage from the IEP Standards document reflects this thinking:

Collaboration is important to ensure that the members of the team have a common understanding of the student's strengths, interests, and needs. Each individual will bring important information to the IEP development process, lending a perspective that will add to the team's collective understanding of the student and of the kind of instruction and support necessary to facilitate the student's learning....Although the IEP is developed collaboratively, the principal is ultimately responsible for each student's plan. (p. 18-19)

An explicit statement made in this document also states that "the principal must ensure parents and the student who is 16 years of age or older, are consulted in the development and review of the IEP" (p. 17; Regulation 181/98, 6(6) (a)). Moreover, the IEP Resource Guide 2004 takes an authoritative stance by pointing out that this is a legal requirement under Regulation 181/98: "Principals are legally required to ensure" parents and students who are 16 years of age or older are consulted (p. 13-14). The involvement of others outside of the school board, such as community professionals, is qualified through particular wording that denotes other stakeholders as people who possess expertise and relevant knowledge of the student.

School board documents correspondingly describe parent involvement as an essential component of the IEP development process. For instance, the A-DSB report states, "Parents/legal guardians, students and staff must be engaged as equal partners in achieving student success. Group collaboration is imperative to ensure appropriate

programming, placement decisions and the implementation of an effective IEP.” This rhetoric is used at various points throughout the report. It goes on to suggest that collaborative practice is an key aspect of the school board’s commitment to special education, “putting the needs of the students first” by advancing collaborative practices among staff members, effectively communicating with parents, and engaging with the community to share expertise. In much the same way, collaboration is described in the C-DSB document as an overarching belief of the school board. It states that the school board believes in “The importance of working collaboratively with all of our stakeholders in achieving the most effective learning opportunities and outcomes for our learners.”

The prevailing discourse throughout documents articulates that collaboration, cooperation, and communication among stakeholders is vital to the successful development of the IEP. Each document indicates expectations for school personnel to build and maintain partnerships with key stakeholders who are considered by the principal to be able to contribute relevant information for planning a student’s school program. Thus, the principal is afforded the authority for ensuring collaborative practices are followed and for determining the level and nature of the contribution of others. Ultimately, the principal is positioned as the primary person responsible for the IEP.

### **Concluding Comments**

The thematic findings from the review of educational documents reveal the dominant hegemonic discourses that are seen in this study as impacting on teachers’

thinking, actions and experiences in developing IEPs. Notably, these findings serve as an entry point for looking at the relationship between institutional narratives and those of teachers. In light of this knowledge, I next present the key findings from interview data collected from classroom teachers as the cases for this study.

## **Section II: Teacher Interviews**

### ***Returning to My Research Questions***

My study began with the overarching research question: *What are the prevailing narratives that inform and direct IEP development for children with intellectual developmental disabilities in Ontario and what are the embedded components of these narratives?* In order to fully answer this question, I asked five guiding sub-questions: (1) How do elementary classroom teachers conceptualize and understand intellectual developmental disability and special educational needs?, (2) How do models of disability and classification systems of exceptionality inform teachers' work in the development of IEPs?, (3) What factors influence teachers' work in IEP development for students with IDD?, (4) What principal beliefs do teachers mobilize and narrate to explain IEP curricula content for children with IDD?, and (5) In what ways do educational documents related to the IEP influence teachers' work in the IEP development process?

### ***Looking at the Narratives of Classroom Teachers***

An examination of the questions posed for this study reveals that my intent was to uncover the everyday narratives that teachers use to explain IEP development for their students with IDD and the beliefs and perspectives embedded within these

narratives that underpin their work in this process. Importantly, findings presented from the analysis of educational documents help to contextualize the principal research findings from interview data and assist in explaining how institutional discourses permeate those of classroom teachers so as to affect their beliefs, perceptions, and practices when developing IEPs.

Bruner (1987) suggests that “people organize their experiences in, knowledge about and transactions with the social world” by the organizing principle of narrative (p. 25). Following this claim, I considered the IEP process to be a crucial site for looking at the narratives of teachers through which they organize their knowledge and understandings about disability/IDD and special educational needs to construct the education of students with developmental disability. As Connelly and Clandinin (1990) add, “education is the construction and reconstruction of personal and social stories” (p. 2). For this study then, teachers’ narratives illuminate how they make sense of the education of children with IDD and how stories of students are (re)constructed and situated within the institutional realm of the IEP process.

During interviews, participants were given the space to reflect on their own perceptions, opinions, tensions, and experiences as they told their stories. Teachers were able to formulate their narratives openly and honestly, drawing on information that they perceived as factual as well as on information that was dependent on their memory reconstruction of events, experiences and reflections (Pepper & Wildy, 2009). Working from the Individual Participant Summary Form developed for each participant as an individual case record (Appendix K), a cross-case analysis of data was completed. Nine

salient themes were uncovered as they emerged from the whole (Creswell, 2007, 2009) that capture the patterns of beliefs, perceptions, practices and experiences of teacher participants. These key themes are summarized in Table 3.

Table 3. Key analytical themes and subthemes in interview data

<b>Analytical Themes and Sub-themes</b>	
<ol style="list-style-type: none"> <li>1. Personal Factors of Teacher <ul style="list-style-type: none"> <li>▪ Teaching/professional experience</li> <li>▪ Sense of preparedness /self-efficacy</li> <li>▪ Professional knowledge/skill</li> <li>▪ Personal belief/attitude</li> </ul> </li> <li>2. Conceptualizations and Representations <ul style="list-style-type: none"> <li>▪ Exceptionality/Disability/IDD</li> <li>▪ Special educational needs</li> <li>▪ Individualized education</li> </ul> </li> <li>3. Sources of Student Knowledge <ul style="list-style-type: none"> <li>▪ Classroom assessment</li> <li>▪ Formal assessment/testing</li> <li>▪ OSR documentation</li> <li>▪ Previous IEP(s)</li> <li>▪ Report card(s)</li> <li>▪ Previous teacher(s)</li> <li>▪ Parent/family</li> <li>▪ Other professional(s)</li> <li>▪ Support staff (school/school board)</li> </ul> </li> <li>4. Classroom Context <ul style="list-style-type: none"> <li>▪ Regular classroom</li> <li>▪ Special education classroom</li> <li>▪ Grade level /division (Pr., Jr., Int.)</li> </ul> </li> <li>5. IEP Development Practice <ul style="list-style-type: none"> <li>▪ Information gathering</li> <li>▪ Planning/decision making</li> <li>▪ Other strategy/action</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>6. Concentration of IEP Content <ul style="list-style-type: none"> <li>▪ Regular curriculum (Ontario)</li> <li>▪ Alternative curricula</li> <li>▪ Combination regular &amp; alternative curricula</li> </ul> </li> <li>7. Collaboration and Involvement of Others <ul style="list-style-type: none"> <li>▪ School team</li> <li>▪ School administration</li> <li>▪ Other colleagues/teachers</li> <li>▪ Resource Teacher(s)</li> <li>▪ EA(s)</li> <li>▪ Student</li> <li>▪ Parent/family</li> <li>▪ School Board staff</li> <li>▪ Community Practitioner(s)</li> </ul> </li> <li>8. School Board/School Culture <ul style="list-style-type: none"> <li>▪ Leadership</li> <li>▪ Professional Development</li> <li>▪ Collegiality of staff</li> <li>▪ Priorities of School</li> <li>▪ Ideology/Attitudes</li> <li>▪ School Practice</li> <li>▪ Availability of resources/support</li> </ul> </li> <li>9. Teacher Satisfaction <ul style="list-style-type: none"> <li>▪ Challenges/barriers</li> <li>▪ Benefits/Usefulness</li> </ul> </li> </ol>

## **Key Findings**

Given the commonality of the research phenomenon that all study participants shared (Stough & Palmer, 2003) and the thematic categories found to apply across all participant transcripts, findings are addressed collectively according to the sub-questions for the study. However, representative excerpts from individual transcripts are used to support my findings in order to remain sensitive to the personal stories and contextual particularities of each participant (Patton, 2002). Importantly, the picture that emerged for me was that participants were actively drawing on their professional knowledge and teaching experiences to respond to my interview questions. Each sub-question is taken up by noting how the major themes that came out in the analysis of interview data make sense to answering the question. A crucial point to be made here is that a number of themes were found to overlap and interrelate to answer the questions.

Table 4 illustrates how these key themes were found to apply to each research sub-question.

1. *How do elementary classroom teachers conceptualize and understand intellectual developmental disability (IDD) and special educational needs?*

I begin by emphasizing that this question sought to uncover the conceptions and understandings that teachers brought to IEP development that were central to how they looked at the individualization of educational programs for their students with IDD. Findings specifically focus on teachers' perceptions of IDD and the meaning of special educational needs. Three overlapping themes emerged as primary explanatory constructs for answering this question. First, I attend to the theme of conceptualizations and

representations that capture the particular perceptions and understandings of teachers. Next, I address the findings that represent the theme of sources of student knowledge. Moving from this thematic category, I present findings related to the theme of personal factors of teachers. Together these themes offer a way to juxtapose the multiple perspectives and factors that contribute to an understanding of how this research question is best answered.

Table 4. Key themes as they pertain to research sub-questions

<b>Research sub-question</b>	<b>Key Themes Across Case Data</b>
How do elementary classroom teachers conceptualize and understand intellectual developmental disability (IDD) and special educational needs?	<ul style="list-style-type: none"> <li>▪ Conceptualizations and Representations</li> <li>▪ Sources of Student Knowledge</li> <li>▪ Personal Factors of Teacher</li> </ul>
How do models of disability and classification systems of exceptionality inform teachers' work in the development of IEPs?	<ul style="list-style-type: none"> <li>▪ Conceptualizations and Representations</li> </ul>
What factors influence teachers' work in IEP development for students with IDD?	<ul style="list-style-type: none"> <li>▪ Personal Factors of Teacher</li> <li>▪ School and School Board Culture</li> <li>▪ Teacher Satisfaction</li> <li>▪ Sources of Student Knowledge</li> <li>▪ Collaboration and Involvement of Others</li> <li>▪ Classroom Context</li> <li>▪ Conceptualizations and Representations</li> </ul>
What beliefs and assumptions do teachers mobilize and narrate to explain IEP curricular content for children with IDD?	<ul style="list-style-type: none"> <li>▪ Conceptualizations and Representations</li> <li>▪ School and School Board Culture</li> <li>▪ IEP Development Practice</li> <li>▪ Classroom Context</li> <li>▪ Concentration of IEP Content</li> </ul>
In what ways do educational documents related to the IEP influence teachers' work in the IEP development process?	<ul style="list-style-type: none"> <li>▪ Conceptualizations and Representations</li> <li>▪ School and School Board Culture</li> <li>▪ IEP Development Practice</li> </ul>

*Conceptualizations and representations*

The theme of conceptualizations and representations exposed the centrality of notions about the individual limitations of students with IDD, the constraints and deficits associated with this disability, and the resultant special educational needs that became the basis for individualized educational programs. In defining this theme, I took into account what seemed to be the primary ideas used by participants to describe their understandings about disability and IDD and about special educational needs. When asked how they conceptualized IDD, participants' remarks were primarily associated with areas of difficulty that they ascribed to people with IDD and in comparison to beliefs about the normal development of children. Perceptions generally were linked to ideas, images and beliefs about within-the-child conditions caused by intellectual disability. All teachers used similar descriptors to talk about students with IDD and special educational needs. Appendix M provides an illustrative example of these descriptions. As illustrated, teachers' narratives are connected not only in content but by the choice of words and expressions.

During my interview with Rachel, a Grade 4 teacher, she reiterates the view of several participants as she describes children with IDD as having significant differences in how they learn in comparison to their same age peers due to cognitive disability. Rachel, says this about her student: "I knew that his brain worked differently. That's kind of how I thought about it", adding that children with IDD require significant support and "have unique needs" that are different from the other students (R1: 60, 151). Rachel's account reflects a common perception found among participants in that she



takes a normalized view of student development and explains that her student with IDD functions “significantly below age level” compared to other students. As a result, she concludes that students with IDD have “unique and significant needs” that necessitate a great deal of support (R1: 160).

When asked about how she conceptualizes the meaning of IDD, Mandy, a Grade 5/6 teacher stated that when she hears the term, her understanding varies, commenting that “*no two* are the same, right? So you never really know and even with S., no two days are the same. So it has to be - go with the flow. You *never know what you’re going to get*. And so when you develop the IEP, you have to keep that in the back of your head” (M1: 29-31). Like almost all of the participants, Cathy, an intermediate special education class teacher puts the focus on students’ differences and delays. Her story demonstrates a typical account evidenced in the narratives of other participants:

IDD, for me - it usually means that they are just learning differently, that they are probably several grades below – where their same aged peers would be. It doesn’t mean that they can’t do similar tasks, it’s just that they need it in a very different way or simplified or with much more practice – and I often think too that IDD means we need to sort of scale it back and get to the basics or the bare bones. So you know I think it’s a different learning style - IDD is such a broad range and the students I have in here, they’re very bright and just different ways of approaching things. You know I see a developmental disability and I think they just got a mark on a test, that first percentile – it’s such a broad brush you know. (C1: 75-92)

Interestingly, while Cathy described her students as bright and recognized that they learned in different ways, she placed her focus on the acquisition of life skills and functional skills in literacy and numeracy that were outside of the Ontario curriculum.

For the most part, teachers' accounts seemed to dovetail with the diagnostic characteristics associated with IDD that included traits related to cognitive, language, social, adaptive behaviour, and independent functioning. In other words, participants framed their understanding of IDD in terms of students' significant deficiencies that they associated with cognitive and academic functioning, social and behavioural skills, difficulties in adaptive functioning and independence, and the need for significant support at school and in the community. While participants attempted to ensure that they described the student as equally important as any other pupil, at the same time, they tended to use naming practices such as 'my developmental student' or my 'special ed student' to distinguish the child as a separate type of learner that explained the need for an IEP. It became evident that much of the collective narrative used to explain IDD was constructed around polarities and binaries such as disability and ability, normal and abnormal, and specific delays that impaired children's ability to learn and perform in comparison to nondisabled students. These perceptions are suggested by Daisy's comments as she describes the students in her junior/intermediate special education classroom in terms of delays and gaps in areas of functioning measured by some standard. She states, "We have students with developmental delays. We're comparing our students to some standard. It doesn't hurt to see. There are gaps in different areas but I think we know that about our students anyway" (D1: 48).

Findings on the conceptualization of IDD are important for a number of reasons. They suggest that teachers adopt a deficit-based lens when looking at their students for the purpose of IEP development and therefore frame their understandings about the individualization of educational programs from this perspective. Although participants were quick to describe their perspectives about students with IDD and the characteristics they associated with this disability, all teachers did not convey the same sense of confidence about explaining how they conceptualized special educational needs. Despite the apparent rhetoric and sense of familiarity in using the term ‘special educational need’, participants tended to grapple with articulating how they would explain this concept. John, a special class teacher of intermediate students expressed his underlying frustration with being asked to put into words what a special educational need meant to him. He attempts to offer an explanation by first laughing. He remarks, “I don’t know, that’s a tough question...Gosh, what do other people say for this? I’m sitting here, I’m thinking hard...whether or not you think of it as a deficit or, I don’t know” (J1: 155, 159, 163). John was relieved to hear that he was not alone in struggling to explicate his thinking about a special educational need. None of the participants offered a definitive explanation about the term and instead took a broad perspective, suggesting that all students have individual learning needs. For the most part, as teacher participants tended to talk about special educational needs in reference to the weaknesses and deficits exhibited by the student in learning and performing. This seemed to suggest that they associated special educational needs with some form of educational disadvantage. Importantly, although participants needed time to think about the meaning that special

educational needs had for them, collectively their narratives suggested that the ways in which teachers understood special needs was a major determinant on their decision making about IEP targets and educational outcomes.

For Lily, the other children in her regular Grade 3/4 class were used as a frame of reference for conceptualizing the student's special educational needs. I explored this further with Lily who described the student in reference to her same age peers. Lily begins to talk about how she conceptualizes the student and her needs by first putting the focus on herself as the teacher in relationship to the challenges she faced in teaching the student because of the pupil's disability:

The first thing that came to my mind was that it's going to be busy. The needs are greater, and this is the first year where the student hasn't had a full-time EA. So, I knew it was going to be a challenge, it's just challenging for everybody. I knew the student before the school year started. So I kind of had a sense of who she was and what she needed. But it's kind of like any other student I would say. Like a lot can change. (L1: 28-30)

Drew, one of the special education class teachers, spoke of his students' delays and gaps in learning across different skill areas. He reasons that "Special needs are those ones obviously lacking" (DR1: 48-50; 162). Similarly, Kate, a primary/junior special education class teacher tells her story of how she understands the special educational needs of her students. She tends to conceptualize special needs in relationship to students' differences in learning and skills in adaptive functioning. Kate says:

I guess the needs are maybe different from - like life skills and stuff aren't something that traditionally should be taught at school, or working longer on things, or working on some behaviour things that kids might just naturally develop even before they come to school. You know, basic communication and dressing and toileting. So I guess I think of those things. They might need something special because they can only learn in a structured way that's a very unique need. So I guess another word would be very individualized, very individualized needs or unique. My goal is for them to be able to function as independently as they can. (K1: 39-43)

Nancy, a Grade 1/2 teacher made it clear that she found it very difficult to articulate how she perceived the meaning of special educational needs, adding that "all of us have areas of need" and that "normal is a setting on the dryer" (N1: 22, 69). Nonetheless, Nancy moves to describing special needs as "the flip side of strengths" (N1: 66). She talks about her student's special needs in terms of his personal struggles in specific areas of functioning such as academically and in motor skill development. Nancy qualifies her remarks by adding that she also perceives the student's special needs as meaning his need to have "special goals set for him" in the IEP. She states that he needs each subject area to be individualized by setting goals that take into consideration his areas of struggle (N1: 71-79). Rather than describing a special need as something that is objectified only as a deficit or deficiency located within the individual, Nancy tends to frame her understanding of a special educational need as also meaning the student's need for something such as the need for a particular individualized learning goal.

In explaining how she understands the meaning of special educational needs, Mandy, the Grade 5/6 teacher comments, “For someone like S, that’s easier than some because it’s language skills. That’s the big thing. Fine motor, gross motor, right? All of those things are very obvious with S”. Mandy tends to stress specific skill areas to explain special needs. She goes on to state, “The Resource Teacher does the actual input of the IEP information about the special needs. I know from doing it at another school that there are things that you can pick from but then you also adapt them to the person” (M1: 79-81). Mandy’s narrative suggests that the Resource Teacher is instrumental in identifying the student’s needs for developing the IEP. As observed with a few other participants, she also describes her understanding of special needs according to a specific list of needs made available to teachers by her school board.

Teachers in junior and intermediate grade levels (Gr. 4-8) frequently spoke of special educational needs in relationship to a student’s need to function independently. For instance, independence seemed to be used as a qualifier for conceptualizing a special need and the extent of that need in relationship to students’ lives within the school setting and in the community. Interestingly, no participants correlated a special educational need as meaning a need related to a student’s strengths or capabilities. Of note, only a couple of participants incorporated the view that a special need could also mean the need for human or material support as a result of the physical and/or social environment such as needs for adapting the environment in order for the student to learn such as through technology or specialized equipment.

Overall, throughout our interviews, teachers talked about special educational needs in reference to a student's deficits or weaknesses. For the most part, it seemed that teachers perceived special educational needs as something to be overcome in order for the student to successfully learn and participate in the classroom and in life. My findings indicate that participants have similar beliefs and perceptions about IDD and draw on common assumptions about the traits and attributes ascribed to people with intellectual developmental disability. Furthermore, while participants did not find it easy to clarify the meaning of special educational needs, their stories were similar in how they relied on descriptions of deficits and difficulties to explain the needs of students based on the characteristics they associated with IDD.

#### *Sources of student knowledge*

As noted in educational documents, the use of various sources of student information is seen as essential to the planning, development, and revision of the IEP (IEP Standards 2000; IEP Resource Guide 2004). During the interviews, I noted how teachers described their keen interest in learning about each student and acknowledged the importance of having a good understanding of the pupil. That said, a variety of comments from participants pointed to certain sources of student knowledge that were given precedence and therefore appeared to be important to shaping teachers' views and understandings of students. As teacher participants spoke about knowledge sources used, they strongly hinted at relying on familiar sources of information rather than on creating assessments or seeking out new sources to inform the development of the IEP. Most indicated that they capitalized on existing knowledge sources, especially the

previous IEP(s), the June report card, and other OSR documentation such as assessment reports from therapists. All participants told me that the previous IEP(s) provided very useful information for formulating an understanding of the student, the student's special needs, and the individualized curricular goals and expectations to be addressed. This information was described as particularly helpful for developing IEPs during the first part of the new school year. The following story from Sarah, a Grade7 teacher, tells of how she tries to access various sources of information about her student:

We get copious transition notes. It helps to understand where they're coming from. Definitely the previous IEP....So we could look at the baseline. Because you don't want to go back from where they were, because that's when parents are going to say, "Ok, they were on grade four [expectations] last year. Why are they on grade three this year?" So unless the student has slid, you generally want to keep that continuum going based on what their success was. So looking at the previous report card and...the expectation that is in the IEP....For me as the teacher then, I can look at that last IEP, their last report card...and their IPRC documentation, everything in their OSR is very helpful when you're doing this.

(S1: 132)

Drew similarly describes the previous IEP as a major source of information. He states:

A lot of it is already there. I'm lucky enough that it's already there from their last IEP. So I read through it after I get to know them...I'll read through it and say, "OK, this is still a strength, this is still a need. If there's something I don't agree



with, I'll change it....So what I do is use what's existing and either I disagree or I agree with it. I leave it or I add it. (DR1: 219)

Unlike a number of participants, Sarah mentions conversations with both the parents and the student as valuable sources of information. Both Drew's and Sarah's comments indicate a reliance on existing sources of knowledge about the student. Moreover, their narratives suggest that by relying on this form of information, the perceptions and beliefs of other teachers are taken into account.

When talking about the use of information from formal assessments such as psychometric tests, two major viewpoints came out. First, participants were more likely to describe these assessments as being outdated and, second, these assessments were seen as offering little practical information for developing the IEP. As an example, one teacher commented that although she often found these reports to be not very current, she added, "I do go over psych reports...I do read them because it does give a good history." As teachers described the sources of student knowledge they used, it not only became apparent that they generally relied on the same sources of information but that their own professional judgement was a significant factor in determining the type of information used and the way it was applied to the development of the IEP.

#### *Personal factors of teachers*

During the analysis of interview data, personal factors of teachers emerged as a key theme contributing to teachers' perceptions and understandings of students. In particular, teaching/professional experience, professional knowledge/skills, sense of preparedness, and teacher beliefs and attitudes emerged as interrelated sub-themes to be

considered. With this in mind, I looked at how these ideas were implicated in the conceptions and understandings that teachers held about students with IDD and students' special educational needs. What my data indicated was that the personal factors of teachers did not seem to produce any noteworthy differences in the ways in which participants conceptualized IDD or understood the characteristics of students with IDD.

However, interview data did suggest that professional experience, sense of preparedness and self-efficacy, professional knowledge/skills, and beliefs and attitudes were important overlapping areas that contributed to how teachers constructed their perceptions of their students' special educational needs. A number of participants reflected on past teaching or related professional experiences to explain their beliefs about the special educational needs of students. For example, Barb, a special education classroom teacher talked about her experiences working with adolescents and adults with IDD. She recalls that because she had worked in the community supporting individuals with developmental disabilities, she conceptualized the needs of her current students in relationship to that experience and to what she believed they would need to know and be able to do as they got older:

Working at Community Living and seeing what individuals, when they become older and they can live independently in the community – I'd say that impacted on what I wanted to be on the boys' IEPs. Because I just thought – what is purposeful...if I didn't have that, I don't know how I would have adjusted so well to this position. (B1: 74-76, 81)

As this passage indicates, Barb's perceptions of special educational needs seem to be influenced by the knowledge and experiences she acquired from her work experience outside the school setting.

Despite differences in teaching experience across study participants (between 5 and 27 years), as teachers talked about their sense of preparedness for teaching children with IDD, a collective feeling expressed was that their teacher education program left them unprepared for both teaching students with exceptionalities and for developing IEPs. Drew's comments capture the much of the sentiment of all participants as he reflects on his teacher education program and his sense of preparedness. He states, "Those courses can't prepare you for this stuff, not even close. I mean the courses are what they are" (DR1: 16). Most teacher participants recalled that they acquired their knowledge and skills by "learning on the job". Thus, teaching/professional experience, sense of preparedness and self-efficacy as well as professional knowledge/skills were found to be closely connected sub-themes that related to teachers' understandings of the special educational needs of children with IDD and the IEP process.

2. *How do models of disability and classification systems of exceptionality inform teachers' work in the development of IEPs?*

The theme of conceptualizations and representations provides explanation of how models of disability and classification systems inform the development of the IEP. A great deal of what was stated by participants tended to reflect beliefs and perspectives that I believe echoed or reiterated a medical model lens of disability. Teachers were more inclined to view disability as due to within-child conditions. This perspective is in

contrast to conceptualizations of disability as the result of social and environmental conditions that other disability models put forward such as the social model of disability (Oliver, 1996; Shakespeare & Watson, 1997; Thomas, 2004). In looking at the narratives of classroom teachers, it appears that they do not formulate their understandings of students for the purpose of developing the IEP based on social model perspectives about disability and instead stress the internal conditions of the student as the problem to be addressed. Hence, external factors such as pedagogical, social or environmental conditions are not implicated in the disablement of the student.

Teachers' comments tended to characterize the conditions of students with IDD as caused by abnormal intellectual and developmental functioning that interfered with or resulted in impaired normal learning and development. For example, Kate, a special education teacher refers to specific conditions by stating, "they have a challenge communicating, and social skills, and getting along with other people, and some real basic physical, like being able to feed themselves and what not" (K1: 41). Hannah, a regular class teacher suggested a medical model perspective by indicating that she firmly believed the student's disability was due to genetics:

As a back story, mom had a brother who was developmentally disabled. We're fairly certain because he has [this] syndrome and it's hereditary, it runs through the mother and the brother had it, but the mom will not admit it and personally I probably think she won't admit it because that means her genes were the ones that passed it on. (H1: 94-97)

Almost all teachers commented that exceptionality classification, as used by the Ontario Ministry of Education and their school board, had little to do with how they perceived the student or understood the student's educational needs. Further, a number of participants stated that they did not engage with disability diagnoses or labels in their professional work. For the most part, teachers stated that the IDD category of exceptionality and its definition as used in the IPRC process did not affect how they went about developing the IEP. Rather, participants remarked that the category of exceptionality and/or the diagnosis of IDD provided them with little useful information.

When asked if classification systems and category of disability influenced her understanding of students' needs or disability, Wilma, a junior special education class teacher stated, "Yes and no. I treat each child, try my darndest to give them what they need and program for them as individually as I possibly can. So does it matter that they're labelled as whatever. Not so much their intellectual diagnosis" (W1: 58). As Wilma mentions, her concern is on treating the individual student and on providing a program that will overcome challenges. She had little to say about diagnosis as a factor in how she perceives her students as learners. Like Wilma, most teachers believed that exceptionality classification had little to do with their perceptions of students. However, from listening to their stories, I found that many of their storylines were commensurate with the diagnostic status of IDD as a disability category and that this was actually an important space in which students' characteristics and needs were positioned.

To conclude with the question at hand, based on the commonplace descriptors used by participants to conceptualize students with IDD, a deficit-based medical model

lens of disability seems more prevalent within teachers' narratives of students and IEP development when considered in light of other models of disability that focus on social and/or environmental conditions in the disablement of the individual. While teachers' did not specifically articulate that they adopted a medical model perspective of disability, their narratives suggest that this viewpoint is dominant to their thinking for developing the IEP. That is, teachers tended to describe IDD as the result of within-the-person conditions that required special education intervention. I observed that participants more readily explained their thinking about the IEP development process when approached from a medical model perspective that viewed individualized intervention or remediation as the purpose of special education (Baglieri & Shapiro, 2012).

3. *What factors influence teachers' work in IEP development for students with IDD?*

In looking at the data, I became conscious of the fact that a number of major interrelated themes emerged that captured the key factors influencing teachers' work in the IEP development process. This means that several themes contribute to answering this question and must be considered in relationship to each other. Therefore, themes are presented in combination with each other as well as separately to illustrate my findings that address this question.

*Personal factors of teacher/school and school board culture*

I came to see that personal factors of the teacher constituted a recurring theme in the data that connected closely to other key conceptual categories related to influential

factors. It was through a number of statements made by participants that the sub-themes of sense of preparedness and self-efficacy was revealed as important influences on teachers' work. For instance, self-efficacy surfaced as strongly connected to participants' beliefs about their ability to select meaningful learning goals for their students whether based on the Ontario curriculum or alternative curricular areas. I found that regardless of years teaching or class setting, participants revealed that they sometimes felt unsure about the choices they made regarding students' individualized educational programs. Mary, a special education teacher with 20 years of teaching experience remarked about the challenges she felt in choosing appropriate IEP goals for her students. She states, "I think the biggest challenge is sometimes I just feel like I'm not doing enough. You write the IEP goals and you think there's so much more I could be doing" (M1:43).

About half of the participants conveyed a sense of feeling quite confident in their own knowledge and skills for developing the IEP with all participants stating that their knowledge and skills came primarily from experience. This included their sense of personal competency in being able to navigate the mechanical aspects of the IEP program used by their school board. John describes his sense of inadequacy as he recalls feeling uncertain about his knowledge of the IEP process and about developing the IEPs for the students in his special education class who were between 11 and 13 years of age:

I wouldn't say it's high. I'm familiar with them. The thing I find with IEPs is that it's so subjective. Everyone has a different take on it, and a different way of doing it. I struggle with it being so open-ended because I end up questioning

myself, “Am I doing this the right way?” I need someone to tell me if I’m doing this right. I did workshops when I first started teaching, just as an introduction to the IEP kind of thing. Then I did another workshop more recently when the board started implementing a new [resource] document. I do like it as a guide.

(J1: 31-50)

Drew provides a recollection of how he came to learn about the IEP. Here I present a portion of his narrative as he talks about his experiences:

My first experience in developing the IEP was kind of easier because I came in about halfway through the school year. And the IEP expectations were already written. So it was jumping on the IEP engine and just changing the expectations for the goals that we were doing that term. And then after that it was going to talk to administration, partly because she was taking on a resource teacher role. Then our board always puts out different help, like PDF documents about how to do it and lots of workshops also. But I don’t know the best place where I got that learning. It might be from the [AQ] special education courses I did. I did Level Two last year. I look back and I think, well, I was just kind of writing the expectations to get the expectations written in the IEPs. Whereas last year with a little more experience you can step back and say what’s the class going to be working on and what kinds of expectations can I work on? Can I connect those at all? But I think I familiarized myself with IEPs when I started applying for jobs. You need to find out the buzz words that you need to talk about in interviews. The IEP was definitely one of them. Now, for the actual writing of



them, to me it's easier to go and ask somebody. I go and ask a Resource Teacher that's been doing it a long time. (DR1: 46-80)

A number of teachers also recalled feeling that they learned about the IEP through trial and error. At the same time, all regular classroom teachers made reference to how it was through working with Resource Teachers in the school that they developed their knowledge and skills for developing IEPs. It became evident that for these teachers, the Resource Teacher seemed to have an important influence on their work with the extent of this influence described as dependent on the knowledge, skills, and work load of the Resource Teacher and the availability of time to work together. Barb offers another example of how she acquired her knowledge and skills. As noted earlier, Barb had recalled how she believed her initial work experience with individuals with IDD in the community had prepared her for her current teaching assignment in a special education classroom. As I conversed with her about her sense of knowledge and skills for developing the IEP, she remarks about her experiences and about assisting other teachers in developing IEPs:

I had to take it upon myself to train to become the Resource Teacher and the classroom teacher. The first year when I did IEPs, it was a lot of trial and error, teaching myself on the program. It wasn't anything that I received training in which I really wish I would have and now I'm finding a lot of teachers at this school are having difficulty in writing IEPs as well. Before the school Resource Teacher had done everything for them. I learn by doing them. So like I'm considered a Resource Teacher but I need to navigate through things on my own.

I do help the other teachers – like the teachers that my students are integrated into. I do a lot of programming with them. We are having a couple of hiccups with some teachers being accepting, some teachers decide not to modify so we're still working on making changes to that. (B1: 32, 97-126)

Amid Barb's account, school culture emerges as an important overlapping theme related to the personal factors of the teacher. That is, Barb's narrative suggests that feelings of support and collegiality as well as the attitudes of other teachers are closely tied to the culture of the school that was an important influence on her work.

Hannah, the regular Grade 7 class teacher in a small rural school, chose to develop a complex narrative about how she came to feel competent enough to develop the IEP for her student with IDD. Embedded within her story is evidence of the themes of personal factors of the teacher and school culture as being important influences. For instance, Hannah's narrative reveals that school leadership, staff collegiality, attitudes and the practices within the school were important to how she engaged with and experienced the IEP development process. She describes her experiences as both temporally and situationally located in that, as a new teacher to the school, she had little control or power in the development of her student's IEP. Hannah reflects on how the principal and Resource Teacher believed that since she was new and unfamiliar with the student, she didn't possess the knowledge that was necessary to develop the IEP. As a result, she recounts how her voice was silenced. However, Hannah goes on to say that once she got to know the student, she was eventually able to assert her own voice and was able to take on the responsibility for developing the IEP. Her account is one that

reveals an experience that extends from being removed from the process as the teacher, to being supported, and then to one in which she felt all alone:

Initially, when I first taught S., I had little to no input on his IEP. I was told what to put on it by the Resource Teacher and the Principal. I was really uncomfortable with it but I didn't know S. well enough to change it, so I trusted their judgement and that's what it was – because they are due at the end of September and that's not enough time to get to know him and figure out what he needs. By November, when I had to revise it, I had a good handle on where I wanted to go with S. and we changed the goals then. I'm comfortable doing the IEPs. I wish the program didn't change all the time. A couple of years ago I would work with the Resource Teacher and I could go to her. Then our resource support changed and she really didn't have time so it was sit and play with the program until you could figure it out. This year I was completely on my own in the creation of the IEP without any support from special education. We haven't had any [board] training or anything like that. (H1: 29-51)

As these narratives suggest, the theme of school and school board culture emerged as an significant theme that interrelated with other themes for answering the question about key influential factors on the IEP development process. Personal factors of the teacher and the culture of the school and school board appeared to come together to affect teachers' sense of confidence and self-efficacy, pointing out that the support of colleagues, administrators, and resource staff were key components. The storyline to materialize included narratives about the ways in which participants came to view the

leadership within the school and school board as critical to teachers' competency building around the IEP process and facilitating opportunities for staff to learn and work together.

With regards to professional development, what emerged was that the amount and type of professional learning opportunities made available to classroom teachers was a major influence. Drew makes reference to this by stating, "our board always puts out – because the software's constantly changing, so they're always putting out different help...like PDF documents about how to do it...So lots of workshops also" (DR1: 64, 70). On the other hand, Barb, a special education classroom teacher with the same school board chuckles as she responds to my asking about school board workshops: "Not that I've ever seen but...I'm going to assume that maybe the Resource Teacher has received training" (B1: 115). Interestingly, despite they're being special class teachers for the same school board, Drew's and Barb's narratives reveal very different perspectives on the availability of support and professional learning opportunities.

While Drew's account suggests that the focus of his training was on the mechanics of the IEP template, special education teachers from another school board told a different story. These teachers spoke of participating in school board workshops concerned with skills for the actual writing of IEP curricular goals due to the system-wide implementation of a specific resource document to guide the development of IEPs for students in special education classes. Wilma, one of the teachers with this school board remarked that "when it comes time for them to teach us about the IEP, they're not really spending a lot of time on the strengths and needs. It's all about are the goals

measurable? Having the SMART goals” (W1: 82). In contrast, almost all regular classroom teachers commented that they did not participate in board sponsored professional development opportunities in that these were not made available to them. Hannah, for instance, bluntly comments “No, we haven’t had any training like that...the Resource Teacher sent a thing out like before school if we wanted any help before or after school but there’s not any release time to learn about it – it’s strictly on your own” (H1: 48, 50).

However Sarah, the Grade 7 teacher had a different narrative as she described the importance of the culture of the school to her receiving support. She hints at feeling very lucky to be able to access resource help within her school. Sarah reveals how leadership and staff collegiality were significant factors, stating that support from resource staff was extremely strong and involved “tons of networking”. She adds, “Our Resource Teachers are great here. If you need anything, they are terrific. They provide the time - the school board allows them to take time to pull us out, release us, get us up-to-date and trained” (S1: 24). Sarah went on to portray an image of a school in which there was concern for the professional learning needs of staff that materialized into a sense of eagerness and cooperation from staff to work together to increase their knowledge about the IEP.

Like Sarah, a number of participants referred to the need for school-based opportunities for staff to work together. Some teachers specifically noted that it was the principal who was most instrumental, suggesting that the more aware or knowledgeable school administrators were, the more principals saw the importance of providing

opportunities for teachers to learn and work together. Wilma's comment tends to suggest how the principal can be a key factor. She shares a feeling of frustration by stating, "My principal knows nothing about the document, knows nothing about how this is supposed to go...the principal signs the IEP and does not know about what they [the students] are supposed to do" (W1: 29-31). Of the fourteen teacher participants, only five clearly stated that the principal actively facilitated opportunities for them to increase their knowledge and skills for developing the IEP. For teachers in special education classes with the one school board, professional development was made available because of a system-wide initiative in which they were expected to participate.

As I listened to each teacher participant's story, it was apparent that professional development and support varied greatly across schools and school boards. Most teachers attributed these differences to the availability of resource support within the school, professional learning opportunities made available, the priorities of school administrators and the school board, and time and funding constraints. Even though several participants quickly pointed out to me that they considered their professional learning to be very necessary and important, opportunities were very limited to non-existent. A common story was that participants believed the professional development needs of classroom teachers were often ignored with emphasis being placed on training Resource Teachers and school board personnel. Participants overall appeared to accept that they had to develop their knowledge about the IEP within the institutional practices of the school and school system. Embedded within this story, I could hear narratives that

alluded to teacher satisfaction as a key influence on how participants thought about and engaged in the IEP development process. I turn now to presenting these findings.

### *Teacher satisfaction*

As indicated, I found that teacher satisfaction revealed a pattern of findings closely linked to the personal factors of the teacher as well as to the culture of the school and school board. What I frequently heard throughout participants' stories were feelings and opinions about the IEP process as a professional practice as well as narratives that indicated how well they felt satisfied in their work. Amid these accounts were comments about the benefits of the IEP as well as about the challenges teachers faced. Several teachers recalled times when they felt very frustrated with the timing of the IEP, especially during the fall term because of conflicts with the formal Progress Report. More positive stories had to do with feelings of satisfaction that came from receiving support through school resource staff or EAs in the classroom as teachers navigated their way through the development of the IEP. It became clear to me that much of this satisfaction was linked to teachers' feelings of professional autonomy and competency that came from working in a supportive community of practice, from their sense of ownership in the IEP development process, and having their professional development needs recognized.

As I explored teacher satisfaction, I was interested to uncover how participants viewed the effectiveness or usefulness of the IEP to their daily teaching and to the learning of the student. I invited teachers to share their opinions and found that most seemed to feel that the IEP was not all that beneficial for planning daily instruction.

Instead, they described the IEP as more useful for providing direction for long term planning over the course of the school year and for reporting on student progress. An additional benefit was described as the IEP's importance to accessing special services and/or supports in the classroom. During the interviews however, it became obvious that many, if not most participants, considered the IEP process to be very time consuming and paperwork driven. In addition, a number of teachers expressed the opinion that the IEP was more of an administrative task that had little relevancy to the actual daily goings on in the classroom. I offer an example of one narrative from Nancy who had this to say:

Do you know how many hours I spend writing these things and there are teachers oblivious to it. So if it's used as a tool – it's a tool – and so [laughter] – I suppose we are to use the IEP as a tool but practically, it's written on paper so the board can say all of our students are accommodated. If it's being used as a tool, then I'm for it, but if it's just there because it needs to be there, then what's the use in doing it...You go through it and think, 'let's just get this done!'" (N1: 220-225)

Nevertheless, teachers accepted that the development of the IEP was a part of their teaching responsibility and portrayed themselves as complying agents in this process in the effort to abide by Ministry of Education policy and school board directives.

*Sources of student knowledge / collaboration and involvement of others*

Important influential factors were captured through the interrelated themes of sources of student knowledge and collaboration and the involvement of others. I was



curious about how the type of student information used might be a significant influence in the development of the IEP given that information through progress monitoring is considered important to individualized educational programs (Mattatall, 2011). As noted earlier in the chapter, I found that teachers relied heavily on information contained in previous IEP(s) followed by information from the June report card. As I explored other practices used to obtain knowledge about the student, it appeared that all teachers considered information obtained through classroom observation to be an important influence on how they perceived the student and developed the IEP. While teacher-made checklists and portfolios were described as useful sources of information, emphasis seemed to be placed more on these practices for the purpose of writing report cards.

While a few teachers described using the same assessments for all the students in the classroom such as reading assessments, there were some differences in opinion about the value of using assessments designed for students in regular classrooms. For example, most special education class teachers did not believe these tools were very helpful for assessing children with IDD. Additional sources related to the use of reports written by other professionals. Most participants commented that formal psychometric assessments related to measures of intellectual functioning did not affect how they developed the IEP. Half of the participants described looking at reports provided by other professionals such as Occupational Therapists or Speech-Language Pathologists, however, it seemed that teachers considered this information to be more useful for obtaining specialized equipment than for developing specific learning goals. Overall,

sources of student knowledge deemed useful and appropriate by teachers emerged as important influences affecting teachers' work in the development of the IEP.

When participants talked about collaboration and the involvement of others, mention was primarily made of the Resource Teacher(s), Educational Assistant(s), and/or the student's previous teacher(s). Mandy, the grade 5/6 teacher reflects the accounts of several regular classroom teachers as she describes working very closely with the Resource Teacher and meeting with her many times. Mandy then goes on to talk about how she depended on the student's previous IEP(s), looked at reports from therapists, and asked for input from EAs. She refers to herself and the EAs as a team: "We're a team right" (M1:65). In contrast, teachers working in special education classes described little collaboration with Resource Teachers when developing the IEP other than to suggest the Resource Teacher helped with the management of IEP documentation or arranged school team meetings if necessary. They reasoned that this was because the principal considered that they required little, if any, assistance given their teaching position as a special education teacher. For the most part, teachers in special classes felt they were on their own to develop IEPs.

The involvement of parents as partners in the IEP process appeared to be typically achieved through written communication and phone calls between the school and home. Participants shared with me that although they always welcomed input from parents and believed parental involvement was important, what was missing from most accounts was the direct involvement of parents. By probing further about their thinking and practice, I found that parental input was not generally used as a primary source of

information for developing the IEP. Admittedly, it was common to hear teachers say that they developed the IEP prior to sending it home. While a few participants described inviting input from parents during formal teacher-parent interviews, no teacher expressed the need to meet directly with parents or with other professionals such as therapists to specifically plan and develop the IEP. Rather, teachers were accustomed to sending the IEP home once it had been developed. Their habitual practice (Bourdieu, 1977) in their classrooms was to send the IEP home for parents to read and sign. They tended to consider that in doing so, their practice aligned with institutional discourses about involving parents. Further, there was no suggestion made that parental involvement changed throughout the school year.

Mandy's comments clearly articulated the process of involving parents for most study participants. She stated, "the parents don't really give much input because a lot of it has already been set. When the IEP goes home, there is a form that asks would you like any changes? Do you agree with what the IEP says?" (M1: 96). However, a differing story was provided by Kate who had been a special education teacher for 27 years. Kate describes the importance of getting parents' input on their child's development, especially in the area of life skills so that she could connect school-based goals with those skills being worked on in the home. "It makes sense that we do it both at home and at school. And so I find out what they're doing at home. I find that helps to be working on the same skills, especially with life skills" (K1: 35). Kate indicated that this did not mean she always met directly with parents but rather sought out specific

types of input to make decisions about the development of IEP goals prior to sending it home.

Teachers' involvement-of-parents narratives tended to reveal their sense of expectation that the parents would be in agreement with the child's IEP as it was written. Most expressed the view that parents were usually quite happy and content with their child's IEP and the teacher's decisions regarding its content. Of note, only a couple of teachers stated that they actively involved students in making decisions about IEP goals. Most were of the opinion that students with IDD were unable to participate in the process because teachers believed these students would not be able to understand what the IEP was or how it mattered to their school program.

The collective story further tells of challenges and difficulties teachers experienced in seeking parent input. A common narrative was that despite any effort to include parents, their involvement ranged from limited to none. Challenges were described as due to time constraints, the professional work-load of the teacher, and difficulties in collaborating with parents or families in the IEP process. When asked to identify the most powerful barriers to parent collaboration, teacher participants spoke of parents' lack of interest, limited time to meet with parents, and parent disagreement about their child's level of needs. In addition, some teachers described feeling that parents saw the IEP as a school-based thing which accounted for the parents' lack of interest or involvement. A few teachers commented that parents did not understand what the IEP was and likely did not care. For example, Nancy's narrative is representative (in terms of content and format) of the perspectives of several teachers. She states, "For the

most part, I think parents don't even know what it is. They see this package of paper comes home, the paper says sign here and they send it back and don't even know what it really is" (N1: 214-216). In a similar way, Rachel comments, "For a parent to look through that and to be signing off on that, I think it must be very cumbersome. So I wonder how much they even understand when they have to sign off" (R1: 74). Wilma added an additional perspective by telling me about her difficulties in communicating with parents from diverse cultural backgrounds. She describes these parents as having little knowledge of the IEP process and as struggling to understand the language involved and the special educational program being provided to their child. She bluntly states, "There's ESL things going on. I'm not quite sure how much they understand me" (W1: 157). Overall, the narratives on collaboration with parents were marked by teachers positioning themselves as active agents seeking input and valuing this input. However, it appeared that a great deal of the importance being attached to parental involvement was connected to parental agreement with the IEP as already written by the teacher.

#### *Classroom context / conceptualizations and representations*

The themes of classroom context and conceptualizations and representations were consistently found to be closely connected themes running through teachers' stories. Not only did classroom setting emerge as a major influence on IEP development, it appeared that teachers constructed the identities of their students according to class context. That is, their stories about the classroom setting served as a means for understanding conceptualizations and representations of students and special

educational needs. While classroom setting was not unexpected as having some impact on participants' stories of their work, the larger discourses on classroom context repeatedly emerged as framing teachers' personal narratives of their thinking and approaches to developing IEPs. Most special education class teachers accounted for decisions about the IEP by drawing on conceptualizations of students and students' specific learning needs in relationship to being in a special class setting. Instead of child-centered narratives, participants also talked about developing IEP curricular goals framed around what was possible within the special classroom setting given the instructional climate and resources available. As an example of the theme of classroom context running through the data, Cathy's remarks reflect the shared sentiment of most teachers in special classes. She explains how her classroom situation influences her thinking about IEP goals for her intermediate students by stating that she focuses on alternative programs because her students are of a particular age and in an intermediate special education classroom:

We are on an alternative program. For my students because of their age, I always try to focus on practical life skills. It's about surviving and so what that requires. I teach them so that they can read what they need to and to enjoy things. For me it's practical life skills always. Even when we think of social skills, those are things that to some degree will normalize them. (C1: 66,166-174)

Although some of her students take part in regular class subjects such as Grade 7 French or physical education, Cathy added that she does not include IEP goals in these subject areas since her students receive a different report card from the Provincial Report Card

used in regular classrooms. She adds that despite her students participating in these subject areas, the regular classroom teachers did not contribute to developing the IEPs nor did they report on student progress since these students “were in a special class”. Cathy remarks, “There’s no opportunity for integration [regular class subject teachers] to report back on the student so it’s very strange” (C1: 143).

Regular classroom teachers more often described their thinking about IEP content and the student’s needs within the context of participating in learning the regular curriculum alongside the other students in the class. Lily’s response is a representation of other regular classroom teachers as she weaves the activities of the other students in her Grade 3/4 class into her narrative:

I think to include her with the other kids, I have to look at what I’m doing in the class and tailor her IEP to something connected to what the other kids are doing.

I need a task for her that’s similar to what the other kids are doing. (L1: 28-34)

As teachers in regular classrooms however, talked about the challenges faced by students in meeting provincial curriculum expectations, they started to bring into the conversation other skill areas such as fine motor, communication, behaviour, and independence, and these areas might be incorporated into the performance tasks developed for IEP goals related to achieving regular provincial curriculum expectations.

As I came to an understanding of my findings, the collective practices, beliefs and experiences of teachers were shown to be strongly influenced by a number of factors. Key interconnecting themes and sub-themes revealed through the collective story illustrate that the personal factors of the teacher, the culture of the school and

school board, teacher satisfaction, sources of student knowledge, collaboration and the involvement of others, classroom context, and conceptualizations and representations were all important areas of influence to be understood. By asking about the beliefs and assumptions teachers mobilize to explain IEP development, these same themes were found to overlap and contribute to answering this particular area of questioning.

4. *What beliefs and assumptions do teachers mobilize and narrate to explain IEP curricular content for children with IDD?*

I begin by noting that participants used their narratives to illustrate their desire to provide a meaningful school program for their students. It soon became clear that as teachers talked about IEP development, their stories disclosed the complexity of the beliefs and assumptions they held and mobilized. As for my other sub-questions asked, a number of interrelated themes became the evidence for answering the question at hand. These themes are presented as follows.

*Conceptualizations and representations / school and school board culture*

Participants' beliefs and assumptions were captured amid their narratives that described the thinking and courses of action drawn on to determine the individualized educational content documented in the IEP. As noted earlier in the chapter, all teachers shared similar perceptions of students with IDD, paying particular attention to deficits and difficulty in cognitive functioning, communication, adaptive behaviour, social skill development, life skills, and independence. It seemed that much of their narrative was coloured by particular understandings framed around beliefs about "normal" development, especially in reference to students' ages and rates of progress in meeting



developmental norms and trajectories in learning. Thus, there tended to be a proliferation of deficit driven beliefs about students and their special educational needs that influenced the curricular content of IEPs. For instance, beliefs about the ability to work independently and engage with others in socially appropriate ways were considered to be very important by each teacher. This is exemplified by Drew, who, in telling about his beliefs, shares his concern for his students' weaknesses in communication and social functioning as he thinks about his students in comparison to nondisabled peers:

So just being able to get them into a regular classroom and talking with other students at grade level is just, it's huge. I mean, I think that's the biggest thing. I think being able to talk with kids their own age is huge. So socializing and communication would be my number one areas for IEP goals. (DR1: 199).

A few teachers referred to their school board's ideology and approach to special education as impacting on their beliefs for developing IEP goals and expectations. I observed that for several participants, stories revolved around the principles purported by their school board regarding students with special educational needs. For example, as previously noted, the narratives of regular classroom teachers from one school board reiterated the board's emphasis on IEP performance goals based on the student's progression through the provincial curriculum. The following narrative was constructed by one teacher within the context of this school board culture:

We don't have alternative programs. We're an inclusive school board....And so, which I mean is good to a certain extent but with this child, right now the gaps

seem not too great but what's he going to be like when he's in Grade 6 or 7? Now it's just a modified program. You can have modified learning skills so again when we are talking about measurable...that's where the jargon comes in. So I break the goals down into term expectations...It all depends on where you think he's capable of working which brings in the reduced expectations. (N1: 162-182)

At the same time, special education class teachers with another school board focused primarily on alternative curricular goals aligned with developmental targets outlined in a resource document purchased by their school board. Participants from the third school board involved in the study talked about trying to incorporate both the Ontario curriculum and alternative program goals given their school board's plan to move to an inclusive approach to special education.

An important belief mobilized by participants was the viewpoint that students with IDD were slow to make progress due to their deficits. Therefore, it seemed that a prevailing assumption was that the needs of students with IDD were unlikely to change in any significant way. What emerged as a result of this storyline was that many teachers divulged that when developing the IEP, they repeated the needs and strengths recorded on the student's Statement of Decision that was created through the IPRC process. Furthermore, it was common to hear that the list of strengths and needs on the IEP did not change to any great extent and were repeated from one IEP to another. This brought to light an additional question that I wanted to ask but avoided for fear of sounding confrontational. I was tempted to explore how teachers might explain revisions to the

IEP curricular content if the needs and/or strengths of the student stayed the same term after term or year after year. What I came to realize was that for most teachers, the lists of needs and strengths were seen as simply one section of the IEP that had to be completed. That said, it seemed that the development of IEP goals was not necessarily directed at addressing these lists of strengths and needs. This was clearly illustrated by the finding that there was a disconnect between IEP targets based on the list of strengths of the student when compared to the emphasis placed on IEP targets to deal with pupils' weaknesses and deficits.

*IEP development practice*

The theme of IEP development practice brings together teachers' thinking and pedagogical practices that surfaced within their accounts of how they went about in the actual development of the IEP. I observed that during our interviews, participants drew on past experiences and their personal perceptions and values as they talked about their actions and strategies. Looking at the language participants used to describe their actions and experiences, all participants described a sense of professional responsibility for developing the IEP and understood their obligations as the classroom teacher. My findings reveal a common story about the practices used by teachers as they engage in the IEP development process.

The collective narrative suggests a generality in the procedures followed that reflects the rhetoric of institutional discourses that transpired in educational documents. Major differences in practice tended to connect to choosing IEP goals and expectations and differences related to the involvement of others such as the Resource Teacher(s) or

EAs. In addition, for some teachers, the storyline focused on the school principal as being instrumental in shaping and directing the practices and procedures followed within the school, especially concerning team meetings or working with other staff such as resource staff. What did emerge for me, therefore, was that IEP development practices seemed closely tied to the idiosyncrasies of the school and school administration. For example, I return to Hannah's story of how she was directed by the principal and Resource Teacher in the development of the IEP because of being a new staff member. Her story reflects that of a couple of participants who talked about some staff as having a dominant voice, alluding to how the positioning of certain staff members such as Resource Teachers within the school bureaucracy affected their practices.

In this light, it became evident that the theme IEP development practices was visibly connected to the culture of the school that in turn emerged as powerfully connected to the actions of teachers. Importantly, patterns in the data also indicated that IEP development practices were noticeably linked to other themes that included classroom context and concentration of IEP content. I now turn to looking at how these two themes come together to address the question about beliefs and assumptions mobilized to explain the curricular content of the IEP.

#### *Classroom context / concentration of IEP content*

The interview data brought to light the overlapping themes that shed light on the beliefs and assumptions teachers have for making decisions about the curricular content of the IEP for students with IDD. For example, when talking about individualized

curricula targets, teachers drew on their beliefs about students' deficits, inabilities and learning difficulties and related these to the current learning environment of the student. This finding is in keeping with other studies into the development of IEPs (Bevan-Brown, 2006). Further, it appeared that classroom context in terms of the dimensions of human and material resources available, grade level, and the learning activities of the other students in the classroom were important to the beliefs and assumptions formulated by teachers for developing the IEP.

My findings imply that teachers hold particular beliefs about students and make assumptions about the kinds of cultural and social capital students either possess or lack for learning and interacting in relationship to the classroom setting and the life of the classroom. My intent here is to point out that although participants framed the development of the IEP according to the individual student, their narratives suggest that classroom context has a major influence on teachers' thinking and decision making about the nature of IEP curricular goals and content that is given privilege. For instance, where classrooms had particular resources available such as kitchen facilities, teachers tended to frame their accounts of students' individual educational needs, such as the kind of capital they need to acquire, around daily life skills and knowledge related to food preparation. An example of this is expressed by Daisy, Cathy and Barb who spoke of developing IEPs based on skill areas involved in the preparation of food since their classrooms included kitchen areas. In contrast, in special education classrooms without these types of resources, teachers focused on other knowledge and skill areas as constituting the important curricula content to be addressed in the IEP such as the use of

computer technology. All teachers seemed to mobilize assumptions about students' possession of valued capital and the learning needs that resulted. Moreover, it appeared that what teachers often considered to be appropriate goals to include in the IEP was influenced by the availability of human and/or material resources within the classroom.

Overall, participants' narratives were found to strongly suggest that classroom context was a significant factor on shaping perceptions of students' individual learning needs and subsequently decisions about IEP curricular content. While classroom setting was not unexpected as having some impact on teachers' practices, it repeatedly emerged as having an important influence on teachers' beliefs and assumptions about students' needs when developing the IEP. Thus, when classroom context is considered, there seems to be a fundamental difference in the perspectives of teachers that come to the fore. I return to my finding that teacher participants from regular classroom settings were more likely to think about a student's needs and IEP goals in light of what other children in the classroom were doing in relationship to learning the Ontario curriculum. On the other hand, special education class teachers seemed more inclined to formulate their perceptions and assumptions from the vantage point of providing alternative educational programs. This was especially apparent in situations where the classroom setting included other types of resources such as kitchen facilities and equipment.

At the same time, despite these differences, as I reflected upon participants' accounts, I felt very much like teachers were quick to externalize the learning of students outside the world of nondisabled students, whether in relation to alternative program goals or modified expectations from the regular curriculum. In either case, the

grand narrative seemed to put teachers' beliefs and assumptions about IEP curricular content chiefly centered on deficit-based understandings of IDD and visible areas of developmental need such as in areas of cognitive, social, behavioural, communication, and daily life skill functioning. For instance, when the theme of IEP content was explored further, what became evident was that a number of teachers did not believe the provincial curriculum should be the focus of the IEP program for students with IDD. While all teachers stated a concern for literacy and numeracy skill development, the achievement of Ontario curriculum expectations in these subject areas appeared to be more of a concern for teachers in regular classrooms who described IEP expectations as being very modified from grade-level expectations. Rachel expressed a common viewpoint that in subject areas such as social studies, modifying the grade level expectations was "tricky" in that IEP expectations for some subjects "had to match" those of her grade four classroom and couldn't be based on subject content from earlier grades (R1: 272). In sum, for half the study participants, they tried to bring into the conversation their beliefs about student learning based on the Ontario curriculum.

An important connection to IEP content appeared to be the connection between teachers' sense of confidence and decision making. As I looked at the interview transcripts from all cases, I discovered a fairly consistent pattern in the data. It seemed that when making final decisions about the curricular content of the IEP, teachers relied on their own professional judgement and knowledge about students. What I also noted was the kind of challenges participants described in terms of identifying what they referred to as 'appropriate' IEP goals for their students. Part of the frustration and

difficulty that many teachers described was attributed to the belief that since students with IDD had so many needs, it was difficult to choose the most beneficial and appropriate IEP goals. This concern was expressed by Mary as she talked about the challenges she felt in choosing appropriate IEP goals for her students. Mary states:

I think sometimes, it's like pigeon holing too. Like sometimes it's very hard to find a goal in some areas but you have to. I feel a bit like you're fluffing it. You're making your best educated guess. Sometimes it's really hard to find the ways that you can move the student. I overestimate for some kids and I underestimate for others. (MR1: 44-45).

Mary's comments also show a sentiment found in the stories of other participants that reflected a conscience about being a good teacher and wanting to do good for the student. A few participants also framed their narrative around the rights of students to receive an educational program that was appropriate to their specific needs, suggesting a moral and ethical obligation to the student that was in keeping with their understanding of the professional responsibilities of the classroom teacher.

To sum up, teachers' narratives about the development of IEP curricular goals indicated an overriding connection between perceptions of students, the nature of the cultural capital students' possessed such as language knowledge, their social capital such as skills for social networking, and beliefs about students' needs that were formulated in relationship to classroom context and the culture of the school and school board. Shaping these viewpoints were beliefs and assumptions teachers mobilized about the educational outcomes they generally considered necessary for students with IDD.



5. *In what ways do educational documents related to the IEP influence teachers' work in the IEP development process?*

From a critical perspective, I wanted to consider how the narratives of the teachers in the study aligned with institutional discourses expressed in educational documents. I was most interested in uncovering how teachers' everyday conversational narratives reflected the ways in which document texts talked about students in special education, special educational needs, and the IEP process. Without questioning the construction of participants' stories, I sought a deeper understanding of the ways in which educational documents produced by the Ministry of Education and local school boards were revealed within teachers' narratives about IEP development.

An interesting comment offered by all participants was that these documents had little to do with how they went about developing the IEP. However, I came to see that teachers would at times reframe their own narratives to align with institutional discourses that were woven into educational texts, indicating perhaps a shift from personal opinions to those embedded in such documents. As such, my findings highlight how teachers' personal narratives are situated within the institutional power narratives that exist within Ontario's education system. In the following section, I look at key thematic findings that serve to illustrate the colonizing narratives of educational documents revealed in teacher participants' stories.

*Conceptualizations and representations / school and school board culture / IEP development practice*

Interview findings dealing with the theme of conceptualizations and representations of students in special education and special educational needs indicate that participants drew on similar conceptions as those communicated in Ministry of Education and school board documents. My analysis of the data found commonalities within narratives to explain student exceptionality, special needs, and the IEP process. As such, the perspectives taken in documents seemed to invite teachers into the same conversation, constructing the student as a separate learner based on particular characteristics associated with difficulties and deficits in learning. For instance, the special education reports produced by the A-DSB and B-DSB repeatedly referred to students in special education as having educational needs that were unique and different from other students. Participants from these school boards tended to reiterate these ideas, describing students with IDD as different from other students and as having unique and separate needs compared to nondisabled students.

Despite participants stating that they considered their beliefs were largely detached from the ideas expressed in educational documents produced by the Ministry of Education or the school board, as I explored how they interpreted the meaning of special educational needs, it was apparent that they were recycling the same perceptions as those articulated in documents. That is, teachers consistently talked of special educational needs in reference to student weaknesses or deficiencies. Although I found that documents were generally vague in defining a special educational need and seemed

to leave this concept open for interpretation, the underlying premise appeared to be that a special need in education meant something that was missing or lacking in the student. In keeping with this discourse, the narratives of participants were found to incorporate similar viewpoints and explanations as those in documents. An important finding therefore, was that these understandings about special educational needs as deficiencies tended to be the conceptual building blocks for the IEP.

Further, in an effort to explain the repetition of student's needs and strengths on the IEP, several participants referred to information from educational documents. For instance, many shared that school board directives, in accordance with government policy, specified that they were unable to change the needs and strengths on the IEP without an IPRC Review. Mary, one of the primary special education class teachers, explicitly recalled her understanding of IEP policy requirements to explain why she did not change the needs and strengths on the IEP without an IPRC. Mary states:

In my mind I've been told that you can't change strengths and needs until IPRC time. So of course they [the students] came with the strengths and needs this year that they had and I look at those and I leave them the same. I have one student that's new to developmental this year. He still came with an IEP. I did tweak that a little bit to make it more appropriate for the classroom setting that we're in because the previous teacher was writing the IEPs looking at him as a special needs student in a regular grade one class. I'm looking at him in a little bit of a different way. And there are still a whole bunch of skills he has, certainly when

you compare him to the group in general. So I did change things a little bit.

(MR1: 19)

While Mary acknowledges making a few minor changes to the needs listed on the student's IEP, she conveys a sense of reluctance to make any changes without going through an IPRC as stated in institutional documents. As for many participants, Mary's narrative uncritically adopts the broader discourse of educational policy documents to make sense of the repetition of needs and strengths on the IEP.

It was apparent to me that the macro level discourses of educational documents were intertwined with teachers' narratives at various points throughout the interview process. Notably, teachers seemed to narrate similar views about students who require an IEP, about the IEP itself and the individualization of school programs, and about special educational needs. As I listened to teachers' stories, it became evident that their ways of perceiving and understanding exceptionality, special educational needs, and the IEP were largely the same as those presented in educational documents. Thus, this suggested to me that particular conceptualizations constructed by the discourses used in institutional documents were generally reproduced by participants to formulate their stories of students and experiences in the IEP process.

In exploring the IEP process in actual practice, teachers' accounts of their work included various stories of the dynamics of schools and school boards at work. As I sought to uncover the ways in which educational documents impacted on teachers' work, their personal narratives reflected a number of practices stipulated in document texts regarding the actions and behaviour of school personnel. In turn, I took the specific

procedures and expectations for practice stated in documents as being instrumental to shaping the particular school culture in which teacher participants worked. For example, educational documents made it clear as to the role of the school principal to ensure teachers followed certain procedures in their professional practice for planning and developing the IEP.

To conclude, in describing their experiences, teachers' narratives clearly portrayed how the power discourses of educational documents were directly and subtly impacting on the ways in which they thought about students and engaged in the IEP development process. Given the tenor of much of the institutional discourse, it was not surprising that teachers' narratives were often similar, drawing on common terms, expressions, meanings, and beliefs. Moreover, teachers rationalized their work by using government and school board discourses to justify and explain their situation and actions as they made sense of their teaching reality. Thus, I came to deduce that identifying the institutional narratives present in participants' personal accounts affords deeper insight into the ways in which these broader educational discourses are implicated in the professional thinking and practice of teachers.

### **Concluding Comments**

As I worked through the interview data, I remained mindful of how my interactions and positioning in the study as both an insider because of my former role as an educator in Ontario and as an outsider doing research might have influenced how the stories and accounts of participants played out during interviews. As the researcher, I strived to capture the meanings and perspectives of teachers while using self-reflection

to keep myself distanced from participants and to be careful not to bring into our dialogue my own beliefs and feelings. That said, interview findings provide evidence of the particularities making up teachers' narratives that describe their understandings and experiences in the IEP development process. In turn, the findings presented show that IEP development is explainable by and makes sense when considered according to the interrelationship of certain major themes and factors.

### **Chapter Summary**

In this chapter, research findings were presented as they address the narratives that tell the story of IEP development for children with IDD in Ontario schools. In light of the prominent themes found in the data, findings were offered in relationship to the research questions that sought to uncover the underlying components of these narratives that shape and inform teachers' thinking and practice in IEP development. Attention was first given to the hegemonic narratives of educational documents in order to understand the policy environment, political rationality, and regulatory intentions directing IEP development across Ontario school boards. Second, findings from interview transcripts illustrated the individual and collective narratives of fourteen classroom teachers that exemplify their beliefs, assumptions, and actions in the IEP development process.

What I can conclude is that a critical comprehensive understanding of the narratives underlying the IEP process requires a consideration of the dynamic interrelationship of multiple components. The themes presented speak to the breadth of subtle and explicit elements that make up the narratives and subjective perspectives of teachers in their professional practice. Findings suggest that the IEP process involves a

number of interrelated factors that extend beyond the institutional cover story (Connelly & Clandinin, 1999) that claims it is the individual student that drives the IEP process. Importantly, findings are considered to have “explanatory force both in individual accounts and across the sample” and therefore are considered as “most likely to apply beyond the sample” (Ayres et al., 2003, p. 872). At the same time, I am mindful of Sleeter (2008) who observes that when listening to the stories of others, “it is important not to attempt to draw sweeping generalizations from any story, but rather to allow the stories to converse, and the disjunctions to sit alongside one another, generating questions for further consideration” (p. 22). In the next chapter, I bring together my findings for discussion organized around key areas that capture the narratives underlying the IEP development process. With these areas in mind, I discuss the research outcomes in the context of my theoretical framework and the existing literature guiding the study.

## Chapter 6

### Discussion

*“It is not what you look at that matters, it is what you see.”*

(Henry David Thoreau)

#### Overview of Discussion

The purpose of this study was to examine the process of IEP development by elementary classroom teachers in Ontario and the narratives that underpin this process. This chapter provides a discussion of the research outcomes and the interpretive insights made. The discussion focuses on four major constructs that bring together the cross-case themes, patterns and regularities found through the qualitative thematic analysis of data gathered from teacher interviews and the review of educational documents. I consider these broad areas as central to answering my research question by providing a holistic understanding into the key components involved in IEP development as it operates in Ontario’s public schools. In discussing the research, my intent is reveal the complexity of these interrelated components that impact on teachers’ work and to point out “how institutional discourses uncritically permeated the everyday narratives of teachers” (Souto-Manning, 2014, p. 166) to colonize their thinking and practices in the development of IEPs for children with IDD. To do this, I consider the hegemonic function of macro-level discourses of educational documents and the micro-level narratives of teachers that steer the particular understandings, beliefs, and pedagogical practices involved in developing IEPs for these students.



To contextualize the discussion, I first return to the study's theoretical framework that guided my search for meaning in the data. I then briefly discuss the IEP process in Ontario in reference to important issues that connect to research in this area. The chapter then moves to a discussion of the four broad thematic constructs used to synthesize findings. These areas are discussed as follows: (1) Knowledge and Conceptualizations that address forms of knowledge and conceptions seen to be significant to teachers' thoughts and actions; (2) Orientations and Concentration of Individualized Curricula that speak to the nature of IEP goals and learning content; (3) IEP Pedagogy and Practice that attends to the broader beliefs, norms, and actions of teachers in light of the school system; and, (4) Key Relational Components and Influences that include the culture and prevailing ethos of the school and school board, classroom context, barriers and impediments, and teachers' feelings of self-efficacy and satisfaction. Aspects of influential factors include those that are transparent as well as those that are subtle or less obvious but nonetheless insightful.

### **Searching for Meaning**

I begin this section by discussing how I came to adopt the interpretive perspectives applied in the analysis and interpretation of data. As has been articulated in the thesis, the conceptual lenses of Pierre Bourdieu and the perspectives of disability theorists provided me the kind of insights I sought for looking at the IEP process. Importantly, in the context of schooling practices for children with IDD, this theoretical framework offered me a critical and alternative way to look at the IEP and the particular narratives surrounding its development. Bourdieu's theoretical concepts provided

refreshing epistemological and reflective radars (Klibthong, 2012) for looking at such a process. His conceptual tools offered “transformative potential” for rupturing the status quo to change perspectives about educational practices “to improve the educational outcomes of marginalised students” (Mills, 2008a, p. 87). Hence, these theoretical tools were the means to critically question IEP development and to consider this process in relationship to what it means to disablement in education and inclusive education. To borrow from Klibthong (2012), Bourdieu’s theoretical tools provide the kind of kaleidoscope through which the values, practices, policies, beliefs, and the dynamic processes at work in school systems can be explored. “In this sense, habitus, capital and field represent the reflective mirrors in the kaleidoscope” (Klibthong, 2012, p. 72) through which the complexities and narratives of school processes such as the IEP process are able to be critically questioned. As Lingard et al. (2005a) state, Bourdieu’s central concepts offer “a fertile field for tilling” (p. 668) in educational policy and practice. Most applicable to an interpretation of the research is Bourdieu’s view that fields such as education have “their own logics or laws of practice” and that social reality exists twice, “in things and minds, in fields and habitus, outside and inside of agents” [teachers] (Lingard et al., 2005b, p. 760).

Following Bourdieu’s thinking, the IEP process can be viewed as part of the school system that is a site for power, status-quo, social reproduction, and for the (re)production of taken-for-granted ideas embedded in the habitus of the school and individual teachers. Listening to the voices of classroom teachers and attending to the authoritative discourses of educational documents, what was heard were conventional

ways of thinking about difference and special educational needs that shaped pedagogical practice around schools' responses to IDD through the IEP process, Bourdieu's insights bring to light how the IEP process has its own logic of practice, language, boundaries, modes of stratification, capital, and power relations that were evident in the narratives informing its operationalization. These narratives reveal "the experience of social agents [teachers] and...the objective structures which make this experience possible" (Bourdieu, 1998, p. 782). Moreover, these narratives bring into focus "the patterns of behaviour of individuals and groups [that] are predictable and long-lasting because they follow and create the hegemonic social structure" (DiGiorgio, 2009, p. 181) through which the IEP process exists and is maintained. I came to understand that the IEP process enables educators to (re)produce their views of the 'other' student in order for them to make sense of how they are to respond to difference in the classroom.

I want to point out here that as an educator, I acknowledge that students have individual differences that can be explained in biological, cognitive, neurological and/or psychological terms. However, as Baglieri et al. (2011) state, the referents used to narrate or symbolize these differences ground educators' understandings and explanations and how they rationalize school failure. And risk of school failure is presented as a reason for special education and the IEP as described in documents such as the IEP Standards document. Gabel (2002) also makes the point that the use of terms informs and often limits the ways in which people's experiences are understood or perceived. Our thoughts and ideas play themselves out in the world through processes such as IEP development.

That said, Bourdieu's concepts illuminate the institutional forces that (re)produce such reasoning and practice, explaining how the habitus of the field institution and the individual agent shapes their particular beliefs, dispositions, and values. I found by engaging with Bourdieu's prominent concepts, I was given a deeper understanding of how and why the IEP process functions as it does in schools and why it continues as a major tool for addressing students' challenges in learning. Importantly, an explication of IEP development and its informing narratives must recognize the social influences and structuring practices of school systems as well as the powerful forces at play within these systems that are central to IEP pedagogy. Critical is the consideration that the meaning of exceptionality, difference, special educational need, and individualized education that is expressed through the IEP process significantly intersects with the educational experience of disability for many students.

It is insufficient not to acknowledge the place of disability theoretical perspectives to explain the lens through which school systems and teachers conceptualize and understand IDD and other disabilities. I drew on the medical, social, and social-relational models of disability (Baglieri et al., 2011; Barton, 1996; Danforth, 1997; Goodley, 2014; Goodley & Roets, 2008; Oliver, 1996; Oliver & Barnes, 2012; Reindal, 2008; Shakespeare & Watson, 1997; Slee, 1997, 2001) to explain the ways in which IDD, disability, and the special learning needs (Dyson, 2001) were conceptualized for the purpose of IEP development and to rationalize individualized education in educators' attempts to reconcile students' differences in learning.

Gabel (2002) brings to this discussion that disability is “a social construct with potentially oppressive consequences that depend on the cultural contexts within which people live” [and work] (p. 186). Vital to my interpretation of the research data is Gabel’s question that asks how disability perspectives rooted in medical model thinking impact on the kind of decisions made by educators because of their enactment of a deficit-based view of disability. She states:

[If] a theoretician considers disabled people as innately deficit...easily becomes thinking of their segregation or marginalization as warranted (or at least unquestioned) or considering them less able to benefit from subject matter teaching...that viewing an individual as *being deficit* limits our ability to imagine what that individual can *do*.... (emphasis in original, p. 187)

In the modernist, positivist sense, disability has a deficit understanding, drawing on psycho-medical, quasi-medical or essentialist discourses (Goodley, 2014; Reindal, 2009, 2010a; Slee, 1997, 2001) that emphasize individual conditions that impair one’s ability. Slee (2001) tells us that such discourses are embraced for diagnosis, identification, classification and remediation and, as a result, educators assume a “bureaucratic discourse that fixes the ‘special student’ as a policy problem requiring a technical solution” (p. 170). IEP policy and practice provides a crucial window into what Slee is claiming. Lubet (2009) adds,

The social model of disability posits a critical distinction between embodied impairment and social constructed disability....The corporeality of impairment may not be in doubt, but its classification as a deficit that inspires oppressive

social action such as exclusionist, 'special' education, resides beyond that body, within culture. (p. 727)

The present research demonstrates the discourses of classification and remediation embraced by educators as well as 'the bureaucratic discourse' of documents that 'fixes the special student as a problem' and the IEP as the 'technical solution'. Put another way, the study shows how the IEP process helps educators to construct those who are able or not able, largely according to the domain of special educational needs that all too often means exclusionary because of the normative nature of our schooling system (Benjamin, 2002; Danforth, 2004; Erevelles, 2000, 2005, 2011; Ferri & Connor, 2006; Fisher, 2007; Ruairc, 2013).

In searching for meaning from the research data, there were many times that I came to a place where I reflected on my position as the researcher-as-instrument (Patton, 2002), understanding that interpretation of research is informed by the researcher's actions, by what the researcher sees happening in the data that is significant, and ultimately by the decisions made about what to include and exclude (White & Drew, 2011). My hope was that teachers' narratives would move past the institutional 'cover stories' (Clandinin & Connelly, 1996, 2000; Connelly & Clandinin, 2006) about the IEP process to reveal their actual beliefs, pedagogic reasoning and acts. Sometimes I felt this was the case. Other times it seemed like the teacher was simply repeating the school system's 'cover story', albeit in a sincere manner.

### **Revisiting the IEP in Ontario's Education System**

As noted earlier in the thesis, the IEP in special education provision in Ontario emerged in a time when school systems in the province began to implement decisive changes to the education of children with disabilities due to legislative changes (Bill 82) to the Ontario Education Act. Important to this study is that the IEP development process and its underlying discourses have to be situated within this policy context. A discussion of the IEP in Ontario's education system requires that its inception and use be located historically and ideologically, linking it to policy and practice that on a rhetorical level, conveys egalitarian and populist ideals of the education and learning of all students regardless of level of need or diagnosis. Currently in Ontario, Regulation 181/98 of the Education Act of Ontario and the IEP Standards 2000 document direct IEP development and implementation in schools. The central premise is that the IEP is an educational tool used to ensure equal educational opportunities for all pupils with special needs. Since it is a working document, the IEP remains consistent with the ongoing needs of the pupil (IEP Standards 2000). Further, the governing discourse used to manage the IEP in Ontario reflects features of the neoliberal orientation of the school system in that measurable learning goals and objectives, student performance indicators, and assessment documentation are seen as essential to the IEP. Overall, the essence of the IEP discourse is that this process is a steadfast approach to managing students with disability or special educational needs. It reveals the ways in which schools approach the academic and social priorities (DiGiorgio, 2009) of these students.

Importantly, a number of studies continue to show ongoing issues and challenges in the development and use of the IEP that I believe are relevant to the Ontario context. For instance, Hirsh (2012) found that in a study of differences in IEP targets, there was an important link between teachers' perceptions of the ideal student, the construction of students' identities and personalities based on gender, the content and distribution of IEP targets, and what pupils achieve or are described to achieve in school. The type and distribution of IEP targets contributed to maintaining stereotypes about pupils. While this study did not focus on pupils with disabilities, the results still have importance to the present research by pointing out that perceptions of students, framed around notions of the ideal learner, have important bearing on the nature of IEP targets selected and ultimately on what students are destined to achieve in school.

Further, the present study confirms other patterns found in previous research that indicate while the development and implementation of the IEP is considered a routine part of teachers' professional practice, there are major discrepancies between educational policy and actual practice (Andreasson et al., 2013; Mitchell, Morton & Hornby, 2010). Further, as my research suggests along with other studies, the IEP is often viewed by teachers as an administrative tool used to demonstrate accountability and to shed a favorable light on the schools' procedures rather than as an educational tool that is actually implemented into the teaching and learning of the student. For instance, teachers indicated that they did not often use the IEP as a foundation for the day to day instruction and evaluation of the student



(Mitchell et al., 2010; Tennant, 2007). As Cathy, one of the special class teachers commented during our interview, “teachers have little autonomy in the IEP process...it’s just something that we have to do because it’s expected by the principal and school board. Do I look at it every day to plan my teaching? I can’t say that I do.”

While this study largely supports the conclusions of other researchers regarding the use of the IEP in everyday teaching and learning, one inconsistency in my data compared to other research was that a few participants did report the IEP was sometimes helpful for reporting on student progress during formal reporting periods in the school year. However, despite the rhetoric of provincial and school board documents about the importance of collaboration in IEP development, a shared finding with previous studies was that the IEP is seldom used as an instrument for collaboration between parents, students, and/or other professionals such as therapists (Millward et al., 2002; Mitchell et al., 2010; Skirtic, 2005; Strogilos & Xanthacou, 2006). I now turn to a discussion of the four broad areas that bring together my findings and what I learned from this research.

### **A Synthesis of Thematic Findings: Major Areas for Discussion**

An integrated picture of the research converges on four major areas that reflect the key ideas and regularities found in the data. These include: Knowledge and Conceptualizations, IEP Pedagogy and Practice, Orientations and Concentration of Individualized Curricula, and Key Relational Components and Influences. In attempting to address my research purpose and questions, one of the biggest challenges was working with the narrative data that characterized the complexity of the interconnected

layers of meanings and factors embedded in the IEP process. Although not unexpected, the IEP development process emerged as one that could not be explained by simply reducing it to an investigation of the defining procedural steps described in policy and educational documents or by the study's participants as they talked about their practices. Rather, the IEP process embodies a number of interrelated components, dispositions, factors, and influences that revealed in the research data. As I shall show in my discussion, capturing the complexity of these four major areas requires recognizing their interconnectedness and that each is significantly implicated in the other. In keeping with a Bourdieuan stance, thinking relationally about these four constructs is critical to interpreting teachers' work in developing IEPs. Given this understanding, these areas are discussed as follows.

***Knowledge and Conceptualizations:***

This main thematic construct concerns the forms of professional knowledge and understandings that teachers draw and reveals the particular conceptualizations and perspectives found to prevail in the development of the IEP. The patterns and regularities in conceptualizations and knowledge used demonstrate not only the ways in which disability models of thinking are implicated in the IEP process but how specific terms and their meanings have been conceptualized and applied in the narratives of educational documents and by teachers.

It is difficult to definitively state what comprises teachers' knowledge about the IEP or about children with IDD. However, as I looked closely at the research data, I was seeing that there were layers of specific knowledge that came into play that embodied

teachers' thinking and practices. On the surface, it might appear that teachers possess the necessary professional knowledge and skills for engaging in the development of IEPs. In reflecting on participants' accounts, I realized I could not assume that each teacher possessed the same or equal amounts of knowledge or understandings about the IEP or about students with IDD. I did consider that the forms of knowledge used by teachers and the meanings and multiple perspectives they derived from this knowledge were situationally and culturally influenced (Lawson et al., 2006). Bourdieu's work supports this notion in that his concept of habitus speaks to the common sense or intuitive way of knowing that individuals have within specific field contexts. This way of knowing was seen to mediate teachers' thinking, actions, dispositions and ways of speaking that I saw as generating their particular understandings and actions associated with the production of the IEP and also in the reception of educational policy discourses regarding the IEP process.

Importantly, Bourdieu (1977; Bourdieu & Passeron, 1990) applies the concept of habitus in the context of education as an analytical tool for understanding how people act in and define their social world, and for understanding how various discourses impact upon the individual to dispose them to think and act in a certain way within a field site such as the school or classroom. A critical point to be taken in this study is that habitus is embodied but made visible in practice (Bourdieu, 1998; Swartz, 1997, 2008). Given these insights, it was necessary for me to consider that the habitus of the teacher informs the present but is shaped by past events and experiences. Hence, it was important for me to capture teachers' background knowledge and experiences as a

relational aspect of the habitus informing their thinking and practices in IEP development.

I return here to the research sub-question that asked about the beliefs that teachers' mobilized to develop the IEP. Teachers' knowledge, values, beliefs, and dispositions related to students with IDD and the individualization of educational programs became visible through how they talked about their approach and practices in the development of IEPs. Taking to heart Bourdieu's view of habitus as generating the mental structures and dispositions that influence the ways in which people internalize their knowledge, experiences, beliefs and conceptualizations, I was given a conceptual tool for considering how teachers view and engage with students, perceive student learning, and make decisions about what to teach and how to include or exclude students from active participation in school work.

In the IEP narrative, the conceptualizations and meanings used by teachers are considered as shaped by the habitus through which they have come to see and understand their students and themselves. For example, this was clearly revealed in the differences in teachers' thinking about the nature of students' learning needs and the kinds of capital that individuals with IDD possessed or required due to differences in teachers' past experiences in teaching, working or interacting with individuals with IDD. As one teacher commented, because of her knowledge about the needs of adolescents and adults with IDD that came from her past work experience, she was able to formulate and rationalize her beliefs about the needs of her students and the IEP goals she identified.

This is perhaps made understandable by noting that the *insider knowledge* that teachers bring to their practice and the knowledge they develop through experience (Cochran-Smith & Lytle, 1999) results in particular understandings that are embedded in and contextualized according to their teaching experience. Subsequently, I was able to see that participants' insider knowledge and the understandings that came of it were brought to bear on the IEP process and in accordance with the classroom setting. Teachers did not privilege one particular form of knowledge but rather, tended to draw on multiple forms of experiential knowledge to formulate their understandings and talk about their students (Gibbs, 2005) to explain their decisions and actions when developing IEPs. There were many times when participants recalled previous experiences and events as being the source of foundational knowledge for their current practices and beliefs. For example, John and Barb recalled the knowledge they had of people with IDD due to previous volunteer and/or work experience with community agencies and the skills they came to see that their students would require as adults with IDD. In comparison, Sarah described a very optimistic perspective about her student's learning that seemed to be influenced by the positive interactions she experienced with her colleagues and the Resource Teachers in the school. These experiences seemed to permeate her pedagogical actions and the beliefs she held about the student's need to learn the same curriculum and participate in the same activities as the other children in her Grade 7 classroom as much as possible.

The notion of *habitus* helps to bridge the conceptualizations held about disability and the meaning of special educational needs enmeshed in the belief structures and

dispositions of teachers and school systems including the stereotyping that socially constructed students into certain learners. In reworking Bourdieu's theoretical ideas with those of disability theorists, I came to a better understanding of the thinking behind the views held, how these perspectives were discursively managed, and why they were sustained in schools for the individualization of school programs.

Narratives put the emphasis on normative constructions of disability and IDD, suggesting the cultural formation of impairment in terms of an individualized phenomenon or condition, deficiencies and deficits which I took as being informed by a medical model lens of disability understanding. This understanding was shared by all fourteen participants. The guiding or directing narratives of documents appeared to repeat these same understandings for clarifying the kind of student who requires an IEP and the meaning of their special educational needs due to 'lagging skills or some 'defective pathology'. I refer to Booth (2009) who notes the influence of educational policy in defining the meanings associated with disability by stating that the definition of disability is "fundamentally a policy decision" (p. 127).

It was clear to me that the beliefs, values, and conceptualizations of teachers actively influenced their views of students and subsequently affected how they approached the IEP development process. These beliefs and conceptualizations were important to the nature of IEP curricular goals selected and to the perceptions teachers held about the capabilities and performance levels that could be expected from students. Teachers used their habitus (shaped and informed by their knowledge and past and present experiences) to classify the students in their classrooms into various categories,

such as those who were ‘special’ and had an IEP and those who were not. In turn, these classifications were seen to frame their understandings in terms of limitations of ability and what this meant to the identification of IEP program goals as well as what they expected the student to be able to do in comparison to the other children in the classroom. This appeared to be an important benchmark for teachers in regular classrooms. Moreover, their ‘IEP narrative’ contained elements of ethical and moral sentiment about doing good and what’s best for the child with an exceptionality such as IDD.

The stories of participants illustrated that the dispositions and practices embodied in their individual and collective ‘teacherly’ habitus (Blackmore, 2010) were shaped by institutional or power discourses and adopted into their own personal constructions of knowledge, values and beliefs. Ultimately, the dominant habitus of the school and the teacher is internalized, and “acts as a mind tool and influences human actions”, interpretations, and how individuals react to events (Agbenyega & Sharma, 2014, p. 122). Habitus therefore can account for the social construction of disability and special needs as well as the formation of learner identity for special education and hence why such formations become central to the IEP process. Habitus and field help explain how identities are (re)produced within the context of the IEP and provide a different approach for looking at classifications of students as instrumental to identity formation. These tools give deeper insight into the ways in which educators construct the learner, and for understanding how exceptionality or difference come to be essentialized and reproduced through the inculcation of the IEP process. That is, IEP development is

valuable for demonstrating the subjectivity and assignment of a disabled identity. Based on this identity, teachers seem to easily explain and justify their pedagogical activities and decisions in IEP development and in the teaching and learning of children with disability.

The ideational basis of the IEP appears to relate to turning students' special needs and disability into something to be managed and controlled. In this sense, beliefs about what is normal and conceptualizations underlying the IEP must be understood as the product of habitus and field in relationship to the logic or laws of practice operating within the context of teachers' practice. As it operates now, the IEP process tends to implicitly endorse perceptions of students as different or separate learners and individualized education as distinctly 'special' and generally separate from the collective learning of other students.

A fundamental finding of this inquiry is in keeping with other studies that suggest the over-emphasis on individual-level considerations and deficits that some researchers describe as "a generally 'defective-approach' (Johannesson, 2006), which skews the understanding of pupils' difficulties in school" (Andreasson et al., 2013, p. 414). Importantly, as Andreasson et al. (2013) claim, the problems associated with students are conceptualized, formulated and provided with social meaning by the particular language used in IEPs. The IEP then becomes a vehicle through which conceptualizations are formulated and encompassed by particular perspectives through which the learner is characterized as being special and his or her learning needs given meaning. Accordingly, in order for the school system to address the educational issues



of students with disabilities, teachers formulate or adopt common conceptualizations that are foundational to shaping their beliefs and understandings of students, interpreting students' special educational needs, and informing practices. Although the language and meanings used in the IEP may not appear to be problematic at first, I point out that IEPs are implemented without being critiqued as a text genre. Related to this issue is that the IEP often is a meeting point where differing or conflicting interests and ideas interact (Andreasson et al., 2013).

### ***IEP Pedagogy and Practice:***

The second key construct to come out of the research was the area of IEP pedagogy and practice. It became apparent that the themes and patterns in the data could be brought together to reflect a particular pedagogy related to the IEP process. Hence, the pedagogy construct is used to capture the beliefs, values, norms, actions, and outcomes (Norwich & Lewis, 2007) that appeared to dominate the particular broad beliefs and actions of teachers. In short, important pedagogical factors were found to constitute the IEP development process. Particular to this is that the policy context of the IEP process flows with certain prevailing 'truths' that organize the thinking and practices of teachers.

### ***Beliefs, Values, Norms***

As I listened to participants' accounts of their beliefs, understandings and activities, certain premises and assumptions about the IEP as well as students were emphasized. The political and educational rationality used by teachers to describe students' needs for an IEP and the individualization of the school program was

entrenched in what I came to consider as the master pedagogical story of the school and school system about who the learner was and what an individualized education meant given the circumstances and perceived difficulties of the student. In this regard, underlying notions of normativity, deviance and difference seemed to prevail and were given expression. This master story situated the student in a specific 'special' light, constructing the pupil's identity as the 'other', both as a learner and in relationship to the learning of other curricular content. The IEP narrative upon which its pedagogy was based appeared to be openly complicit in 'othering' children with disability on the school landscape.

To understand the IEP as a pedagogical process and product of the schooling system, Bourdieuan thinking offers some insight. As a theoretical lens, Bourdieu views the school system as an institutional bureaucratic field that depends on specific field structures, dispositions, and field mechanisms to ensure the social reproduction of the dominant social order and to control the acquisition and distribution of valued capitals such as knowledge, skills, credentials and academic status. In order to do this, particular beliefs, norms, values, and dispositions are used to organize the power relations operating within the field site of the school and the field practice. All agents or teachers within the site need to adopt the collective habitus of the system to meet the aims of the school and school board as it functions to reproduce this social order. Given this perspective, it was important to ask how IEP pedagogical practice operates given this agenda, and, as Bourdieu might contend, facilitate privileging the learning and positioning of some students? In terms of responding to disablement in educational

contexts, this privileging and positioning could be according to who is able and who is less able to acquire the valued capital of the dominant group. In reflecting on this question, the systems of thought that underpin the pedagogical beliefs and values directing the IEP process and disability in schools required critical consideration.

One of the predominant beliefs revealed in the study to frame the IEP process, and supported in the critical literature related to disability in education, is that students with disabilities are seen as different and require specialized knowledge and skills to work with these differences (Agbenyega & Sharma, 2014, p. 117). To add to this argument is that the social construction of disabilities and difference is context dependent and the result of our interpretations that are premised on beliefs about what constitutes as normal (Baglieri et al., 2011; Brantlinger, 2004). Looking at the research, the pedagogical beliefs that participants chose to relate needed to be understood in relationship to the context of their teaching practice (Gibbs, 2005).

The discourses of educational documents were seen to perpetuate the use of specific referents and terms. While teachers came to their professional practice with their own knowledge, beliefs, and understandings, they accessed – consciously or unconsciously- the referents and terminology of institutional discourses related to special education and the IEP to frame their practices and reasoning. For example, almost all participants drew on the expressions used in documents to refer to students with IEPs such as ‘students with unique special educational needs’ or the expression of ‘meeting the individual needs of students’ to convey their sense of professional responsibility for developing IEPs. Hence, my assumption was that the thinking and

actions of teachers in IEP development was better understood as being shaped by a number of beliefs and values that were as much representative of the school system in which they worked as the product of their own personal belief structure.

From a Bourdieuan perspective, the pedagogical beliefs and dispositions of teachers that constitute the habitus of the individual must take into consideration that this habitus is influenced by the habitus of the broader (school) institution. As agents of the field, teachers 'play the game' according to the rules, norms, beliefs, and operating structures that exist in the field. To take this further, a Bourdieuan lens views the beliefs, values, and acts of a social group such as teachers are not the result of personal choices of the individual but are the result of the (re)shaping of one's habitus according to the field and the forces within the field site in which the individual works (Grenfell, 2008).

As I engaged in professional dialogue with participants, the personal beliefs and perspectives articulated appeared to be in constant negotiation with the collective beliefs and values of the school. The master dispositions of the habitus of the school system were seen to direct how teachers formulated their understandings and logic about the IEP process and the students involved in this process which in turn shaped participants' pedagogical practice. Part of the logic of practice to emerge was to view or group students into who were able or not able to learn and do certain things within the classroom. A common identity signifier used was the label of my 'IEP student'. Teachers in turn framed their understandings of students according to the limitations in order to make decisions about learning goals, teaching strategies, and support measures

to be included in the IEP. The idea of breaking down IEP goals and expectations for the student into task-oriented learning and behaviour rested on the educational narrative and logic of the system that considered IEP goals are best defined and managed according to a sequence of observable behaviours and actions qualified by assumptions about what teachers could reasonably expect students to be able to learn and do within a specific time frame (IEP Standards 2000; IEP Resource Guide). The IEP might arguably become a site for the existing system to control the nature of student learning according to particular beliefs and assumptions, preferring to frame it as 'individualization' that may limit or create barriers to inclusive learning and the acquisition of certain forms of capital.

An important aspect of teachers' pedagogy, drawing on Bourdieu's thinking, is that accepted norms of thought make up the *illusio* or the illusion of the game of the school site. Individuals [teachers] buy into this illusion which in turn, shapes their practice. As DiGiorgio (2009) and others suggest, the willingness to buy into the *illusio* of the school strengthens the hold that teachers have on others given that acceptance of the rules and norms improves one's standing and position of power within the school. All stakeholders within the school/school board are seen to subscribe to the *illusio* that perpetuates the accepted beliefs, values, norms, and rules of the game. For example, teachers commonly described their practices according to the rules for developing IEPs and the school system's beliefs and values that accompanied these rules. This is not to say that teachers did not possess their own personal viewpoints about disability or the IEP but that it was part of their professional duty to accept how the 'IEP game' was to

be played within their school. By following the rules, they appeared to accept the hegemonic messages of the system in order to maintain the status quo and their place in it. From this perspective, the extent to which teachers ascribed to the beliefs, norms and rules established through institutional discourses, communicated their compliance to the governing belief structure and practices for carrying out the development of the IEP. For instance, regardless of feeling frustrated with having to develop or revise IEPs at specific points in the school year, teachers clearly played the game and complied to this rule whether or not they believed this to be a productive use of their time or would bring about any significant or meaningful change to their teaching and the learning of the student.

I pause to note the contradictory statements of a few participants who believed that educational documents did not influence their perceptions of students or their decisions about the IEP. While teachers felt this was their reality, their narratives resonated with institutional discourses, incorporating the same terminology and wording of documents to explain their pedagogical activities and thinking. One might interpret this as their unconscious or instinctive use of ‘Ministry’ or ‘Boardspeak’ to convey their knowledge and understandings in compliance to the expected practices for teachers. Bourdieu (1991) helps in this regard by suggesting that people give discursive shape and content to their taken-for-granted understandings, believing that discursive acts or constructs are both descriptive of social reality and simultaneously “constitutive of reality, willing into existence that which they name” (p. 223).

*Practice*

The ways in which teachers framed their beliefs and values provide critical insight into the educational responses of schools to disability. A less transparent function perhaps of the belief system involved in the IEP process was the regulatory control it had over teachers' thoughts and actions concerning their students and IEP development. This larger set of beliefs steered them to understand and accept that special educational needs or disablement were something to be managed and controlled given the 'uniqueness' of the individual student. In other words, the system beliefs constituting the IEP pedagogy were field mechanisms used to convince teachers to accept the meanings and logic of institutional discourses. These beliefs become the foundational 'truths' that are presented as the logic of practice (Bourdieu, 1977) or notions of 'common sense' (Winton & Brewer, 2014) to direct the thinking and practices of teachers. The emergence of Regulation 181/98 and the IEP Standards 2000 as part of Ontario's special educational policy environment provide examples of these foundational truths, giving credence to traditional quasi-medical (Slee, 1997, 2001; Slee & Allan, 2001) ways of understanding special needs and exceptionality in order to shape teachers' pedagogical practices.

Jordan et al. (2010) state that "there are general epistemological belief structures about the nature of ability, disability and learning that are linked to the decisions teachers make about how they teach and to whom, and to their preferences for teaching styles" (p. 264). To contextualize this to IEP pedagogy calls for looking at the ways in which teachers' beliefs relate to their consequent actions and how they specifically act

upon disability and difference to approach the development of IEPs. A point to be made here is that IEP instructional strategies described by teachers for their students with IDD primarily drew on interventionist beliefs (Jordan et al., 2010) dependent on participants' views about the nature of ability and competency, and how students with IDD learn.

Teachers described their actions in ways that defined their compliance to expected board practice, attempting to weave together the narratives of special education with their own viewpoints about good teaching practice. Moreover, the identities and status of teachers as powerful players in the game of IEP development were important to the actions taken. I recall here the case of Hannah who described her sense of positioning and how she felt about having to buy into the school's norms and practices for developing the IEP. For instance, Hannah recounted that the common practice in her school was for the Resource Teacher and the principal to take the lead during IEP meetings where decisions were being made about students' educational programs. Hannah complied to these rules and remained a silent voice in the school's hierarchy until she felt knowledgeable enough to position herself into the school's scheme of doing things and existing power structure. At the same time, she expressed her conflicting viewpoints with the dominant beliefs of the school and school board regarding the nature of the individualized program for her student with IDD. For Hannah, it became a delicate balancing act between meshing her own personal habitus or sets of beliefs and values with the beliefs, values and norms that constituted the habitus of the school system which mandated she develop IEP learning goals and expectations that were solely based on the regular Ontario curriculum. She reveals that



despite this mandate, she felt a major responsibility for also including specific goals that addressed the adaptive skills and functioning of her student.

### *Collaborative Practice*

Because collaboration and the involvement of others is stipulated as a critical component of the IEP process, and is documented in policy documents (IEP Standards 2000) and school board procedures, the issue of collaborative practice as part of the IEP pedagogy requires closer consideration. As the findings of the study show, teachers described similar strategies for involving parents and other stakeholders that aligned with their perceptions about what collaborative practices entailed. "I always send home the IEP for parents to look at. If they want to give me some input, then that's great but usually they just sign it and send it back." Parent involvement, it appears, becomes a narrowly defined aspect of IEP pedagogy that is reported as something that is welcomed but happens in limited ways.

Although the descriptive statements of teacher participants were very close in wording to educational documents and the 'Boardspeak' of school board reports to articulate expectations for collaboration, as an actual form of practice in developing the IEP, the involvement of others was an ideal and not a reality. Teachers were caught in balancing the beliefs and values of the larger system regarding the collaboration with others with what was their lived reality. They drew on their own habitus or beliefs and dispositions to frame their reasoning about why this was difficult to achieve. For many, they believed they had little direct power in terms of involving parents or others from the community in face to face interactions. Indirect participation in the form of

providing parents with a copy of the IEP and asking for input was equated with what teachers reasonably saw as fulfilling the obligation to involve parents. The teacher becomes the agent through which collaborative practice is enacted and positive relationships between the parent, community partners, and the school are established and maintained. The teachers all spoke about the importance of these relationships to their practice. In her interview with me, Kate sums it up when she says, “Well, I’m trying. If I can’t reach them to take them in for an interview, then I try to do a phone interview....I think it depends on the parents, if they want to give you input.” Of the fourteen participants, however, only Kate and another teacher specifically mentioned making phone calls as part of their strategies for involving parents in developing the IEP.

While the focus on collaboration seems like a form of cultivating shared power over the IEP process, and for the most part teachers are assigned the responsibility for sharing this power with others, teachers’ perceptions of their power and positioning in IEP development become increasingly crucial to this practice. In some respects, collaboration forces individuals into positions in which they are to perform and act in certain ways. Bourdieu (1977, 1989, 1993) accounts for individuals’ positioning in the field as determined by the habitus, field forces, mechanisms, and capitals held and exchanged. To apply this thinking to the involvement of parents, students, and others, teachers’ reasons for how they involved others in the game suggest that differing levels of forms of capital - interest, knowledge, skills, credentials, and social status of these players were the contributing or determinant factors. Involving colleagues within the

school reflected teachers' perceptions of shared capital and positioning within the field that facilitated the engagement of these individuals.

Depending on the nature of the home-school relationship, parents seemed to be positioned according to educators' beliefs about the power of parents and the forms of capital they possess. Perceptions of the sort of interests, skills and knowledge (cultural, social, and symbolic capital) that individuals possess or are able to share become essential to collaborative practice. The language used in all educational documents invites parents and other professionals or stakeholders to be active participants. Yet, the IEP Standards empower the principal to decide who may be involved in the IEP process according to those individuals that the principal "considers appropriate" and who "possess the knowledge and qualifications necessary "in terms of the information and experience they possess (p.16, 18). Indirectly, this suggests that the kind of capital others possess such as credentials (symbolic), knowledge (cultural), and networks (social) are significant to the involvement of others in the IEP process. That said, the notion of parental input in the IEP development process reinforces the ideal that parents should be or are able to be active partners in the schooling of their children and are a valuable resource for providing information. At the same time, parents' involvement might be used as a means to further legitimate the IEP process and the school's response to their child with disability.

#### ***Orientations and Concentration of Individualized Curricula:***

The third key area that was to emerge from the patterns and regularities in the data surrounded the individualization of educational programs and specific areas of

curricula that were emphasized by participants. To approach the orientation of individualized educational curricula from a Bourdieuan perspective is “to adopt a different take on the situation” (Grenfell, 2010). The research reveals that the idealized form of an individualized education that concentrates specifically on the individual pupil is perhaps a simplistic and partial picture of the reality of the IEP. Here I draw on Bourdieu’s concepts, particularly field and capitals to show why.

#### *Pedagogical Focus and Beliefs*

What is learned from this study is that the IEP process creates the ‘other’ student who is singled out to be treated pedagogically in a ‘special way’ that may lessen the quality of their schooling experience, access to forms of capital that other students are privileged to acquire, and thus the educational outcomes that result. Further, the fragmentation of educational outcomes, especially because of alternative curricular agendas, is a concern for inclusive education. On this point, Slee (2009) states that fragmentation brings stereotypes, ranking, branding, and tracking of less-empowered fragments of the population into ‘special’ programmes. A Bourdieuan framework can be used to illustrate the potential inequities hidden within the IEP process. That is to say, although the IEP is ideally seen as a tool for ensuring the equitable treatment and learning of students through an individualized educational program, and is perhaps a key component for protecting the educational rights of children and youth with special educational needs, the IEP process also has the potential to exacerbate inequity and the marginalization of students. As an example, the IEP process can be argued as a vehicle through which a student’s access to valued forms of capital is controlled such as capital

that is acquired through access to important curricula, learning outcomes, social experiences and networking, and credentials that are afforded to other students.

Ervevelles (2011) argues that “ideologies present in the school curriculum serve to unwittingly construct certain student subjectivities as deviant, disturbing” and therefore justify their exclusion (p. 2157). The narratives shaping the education content and outcomes for students with IDD were juxtaposed with notions of normativity and students’ positions within the classroom. This speaks to the question of what is the nature of special education and what kind of learning is desired? (Norwich & Lewis, 2007). The IEP process implies that distinct educational provision is provided that includes appropriate curriculum objectives and teaching. The relevancy of particular curricular goals and teaching strategies were dependent on the social context of the classroom. Interestingly enough, I pause here to note that there is little direct evidence to show that distinct pedagogic strategies are linked with the specific needs of students yet special education and the IEP process works with the view that this is the case (Norwich & Lewis, 2007).

A number of participants described their actions and difficulties in developing IEPs, explaining that it was often a challenge to identify appropriate and meaningful goals and expectations for students. Included in this was the challenge of being able to establish appropriate performance targets that were realistic for their students. Many teachers qualified their remarks by adding that children with IDD ‘have so many needs, it’s difficult to know what to put into the IEP’. From these accounts, I considered that teachers’ pedagogical choices of curricular content flowed heavily from their

dispositions and beliefs through which they constructed their understandings of students and perceptions about their learning needs.

However, these understandings and perspectives have to be understood in terms of how the 'teacherly' habitus, field context (school and classroom), and the logic of pedagogic practice of the IEP process, as dictated by formal documents and the school system, worked together to orient participants' thinking and decisions about the curricular content of the IEP. The policy climate and field context in which the IEP process exists supports a redefinition of the valued *capital* to which students are able to access through their individualized program. An alternative explanation is that the underlying narrative of the IEP gives credence to a certain version of capitals, including social, cultural and symbolic capitals, to be accessed by students with disability based on individual needs that are for the most part seen as deficits and the capital distributed as attempts to intervene overcome these deficits. What might be argued is that the IEP process gives legitimation and sanction to selected knowledge and skills to be acquired and exchanged based on the field, educational setting, habitus, and logic of practice affecting teachers' work within the schooling system. In a Bourdieuan sense, IEP policy and practice need to be understood in terms of what Grenfell (2010) refers to as the 'hidden generating structures' within the education setting.

My concern here is to make explicit the links between the concepts of habitus, field, and capitals, and the structures and forces that affect the ways in which teachers orient the individualization of curricular content through the IEP process. Bourdieu's critical perspective draws attention to how the orientation adopted to the development of

the IEP potentially operates as a form of ‘social selection’ in the classroom, preserving the stakeholder interests of the school system and society, and contributing to the reproduction of social patterns of dominance within society. While on one hand, Bourdieu might consider the IEP as a ‘logic of practice’ of the democratic school by not ignoring that every student cannot learn and respond in the same required way, he might also theorize it as a form of social selection through which the acquisition and distribution of valued capital of the dominant group is controlled and students are divided and arranged within the social order of the schooling system.

#### *Information Sources*

Evident in the data was that teachers tend to rely on particular sources of information for developing and revising the IEP. This emerged as a concern in that the use of information sources, particularly related to assessments (formal and classroom-based) as well as input from others tended to be common across teachers. Importantly, it was consistently revealed that teachers gave similar credence to certain forms of student information for developing IEPs with observation and teacher intuition as taking precedence.

It was not clear how teachers specifically applied student information to their decision-making about IEP goals. I did feel that participants recognized the importance of keeping up to date about students’ progress that allowed them to see and monitor changes in learning. What I came to conclude was that input from other sources, especially parents or other professionals, was valued in varying degrees. While all teachers valued home-school connections, and most implemented the practice of

sending home parent information and the IEP at required times during the school year, this strategy seemed not enough to elicit active parent involvement. Interestingly, however, teachers considered this as fulfilling their obligation to include parents in IEP development.

Often teachers noted difficulties with obtaining information from families with varying value placed on the input offered. This might be seen as the result of teachers' perceptions of parents' possession of capital which was noted earlier in the discussion as a potential explanation for the level of collaborative practice that teachers engaged in with parents. As Bourdieu's thinking suggests, the use of input from others may be based on perceptions of cultural, social, symbolic, and economic capital held by these individuals and how the value of these capitals is recognized by educators. Clearly, teachers preferred to rely on informal assessment information obtained through classroom activities that typically focused on observational data.

***Key Relational Components and Influences:***

*Classroom Context and School and School Board Culture*

Teachers' narratives surrounding the IEP circulated outside the realm of policy requirements to include school and classroom settings as significant influences that shaped their thinking and decision making about IEP goals and supports. Within the space of classroom context, teachers balanced out the educational needs of the student with the learning environment and resources of the classroom. In Bourdieu's terms, it is necessary to consider the influence that the field context can have over the nature of educational capital delivered and exchanged and the interests of participants. For



instance, decision making about IEP targets and accessibility to curriculum as valued forms of capital is crucial to considerations made when looking at the IEP process.

As Bourdieu warned, access to forms of capital is not equitable across groups. Trainor (2010) qualifies this somewhat for looking at disability and education by stating that this inequity in accessing capital is due in part because “it relies on the acceptance and application of dominant-group disability paradigms inculcated in school cultures” (p. 245). That is to say, a disability model lens focused on deficits and deficiencies ultimately affects students’ access to forms of capital in terms of the kind of curriculum, experiences, and resources made available. Specific to everyday field sites such as schools and classrooms in which teachers and students found themselves, teachers negotiated what they wanted students to do, what was possible given the classroom context, and what were identified as the special educational needs of the child.

Thus, classroom setting presented itself as a crucial influential factor in terms of its environment, location, resources, and other students for negotiating the development of the IEP. As Hannah’s and other accounts from participants indicate, the school leader (principal) can affect decisions regarding the prioritization of learning goals which reflect the social and symbolic function of the school in society (Bourdieu, 1991). That is, the interest of schools is social reproduction and thus, schools want to keep their members similar in terms of belonging to the same social group, to produce academically able students, and to keep the value of its product or capital (knowledge, outcomes, identity) constant in order to pass on to students the beliefs and knowledge that are valued by the school as a social institution (Bourdieu, 1991). Here, I want to

point out how Bourdieu's perspective incorporates the idea of the culture of the school as crucial to the beliefs, rules, formation and distribution of chosen forms of capital:

It is through the particular manner in which it performs its technical function of communication that a given school system additionally fulfills its social function of conservation and its ideological function of legitimation.

(Bourdieu & Passeron, 1996, p. 102)

It was very clear that when teachers worked in a school culture that was supportive and nurtured their professional growth and development, their sense of efficacy for engaging in the IEP process was enhanced. Moreover, teachers' sense of themselves as knowledgeable and skilled educators capable of developing IEPs for their students was closely tied to their own perceptions of who they were as a teacher within this school and school board culture and how they were valued by administrators and colleagues. School leadership emerged as a crucial factor in enabling teachers to collaborate with colleagues and to be provided with opportunities to increase their skills and knowledge about the IEP and about teaching children with diverse and various levels of educational need. When the culture of the school and school board created a sense of collegiality and support, teachers were more confident in their abilities in the development of IEPs.

School leadership, collegial perspectives and attitudes, the ethos of the school, and the collective efficacy within the school came together as significant to creating a culture that positively impacted on the beliefs of teachers and their professional practice. Dyson et al. (2004) argue the importance of school norm and culture in shaping

teachers' beliefs, pointing out that teachers' beliefs are socially contextualized by the views held in the school, certainly this resonates with Bourdieuan thinking. School culture and environment became instrumental to the conceptions teachers' held about the educational needs of students with IDD, to the decisions made about IEP goals, to professional learning opportunities provided, and to pedagogical practices followed in the IEP development process. For instance, where the ethos of the school focused on collaborative practice, teachers were more likely to refer to the collegiality of staff as important to their work. And where the leadership of the school emphasized the participation of all students in learning the provincial curriculum, teachers talked about IEP target areas focused on the inclusion of regular curriculum subject areas in the IEP.

Habitus allows for considering how teachers negotiate their actions and positions within the social structure of the school to develop the IEP and frame their actions according to their dispositions. This includes thinking about the influence of the collective history of the school community in which teachers work. Bourdieu sees people not only as possessing their own habitus but the habitus that relates to their community and to different social situations. Based on the research, I suggest that at the core of IEP development is the habitus of the teacher and the collective habitus of the institution in relationship to the beliefs, meanings, norms, conceptualizations, values, and pedagogical actions and practices that are mobilized in this process. In this sense, I approached the concept of school and school board culture by considering the habitus of the participant and the habitus related to the broader social arena of the school site. The longer I was engaged with the research, the more I came to see that teachers'

conceptions of disability and special educational needs for developing IEPs were intricately tied to the meanings and perspectives held by the school system. To apply my theoretical lens to this realization, the internalized master dispositions involved in the school habitus are revealed in the meanings and ways teachers produce their conceptualizations and practices to structure their students with IDD in the classroom of which they are a part.

I take the case of Nancy, however, to illustrate how teachers' can be habituated into a kind of duplicity in thinking about IEP development and how the ethos of the school is implicated in this thinking. Nancy's proselytizing view of IDD reflects her strong religious beliefs in which she seems deeply convinced that God created us all and that we are all equal regardless of our circumstances. She states, "We are all God's children. I teach my students that God created all of us and that God gave us all gifts and needs." Nancy's narrative reveals her strong interest in teaching her students tolerance and respect for all people. While she focuses on the belief that everyone has needs to frame her thinking about the children in her class, she also shared some concern about the extent of her student's difficulties as being needs as he moved into other grades. At this point in her story, she tended to waffle between her attempt to distinguish needs as being common to all and needs as deficits that were problematic to the student's academic and social well-being. Nancy describes how she anticipates his difficulties and gaps in learning will become more evident and problematic.

In her narrative, she appears to both separate the student from the rest of the class by not ignoring the student's impairment. During our interview, she has "simplistic

lapses back into biological essentialism” that reflect her understanding of the student with IDD and that maintain her binary distinctions between the students in her class with and without learning difficulties (Goodley & Roets, 2008, p. 243). At the same time, she tries to convey her attitudes of inclusiveness and indifference to difference. Her approach however to IEP development was not only influenced by her own habitus but by the dispositions embedded in the culture and ethos of her school and school board.

It was particularly insightful that for all teachers, their thinking about students and students’ educational needs and outcomes mirrored the stance of the school and school board. This extended to describing IEP content as based solely on the achievement of the Ontario curriculum because of the school board’s ideological stance to IEPs based primarily on alternative educational goals where the beliefs of the school board adopted a differing philosophy. The IEP evolved in part due to the philosophy of the school board despite the apparent similarities in children’s abilities and functioning levels. This raises the issue of how the individualized educational program for children with IDD in this province varies due in part to the particular philosophical tenets of the local school board.

#### *Teacher self-efficacy and satisfaction*

It was evident that some teachers understood the IEP process as an exercise in accountability that showed the school’s commitment to educating the child with special educational needs. Yet teachers struggled with balancing this obligation with their feelings of frustration considering the time needed to produce the IEP. While congruence about how and why the IEP process is used in Ontario’s school system was

evident, similar challenges were described that included difficulties dealing with time constraints, identifying and writing specific goals and expectations, and finding ways to meaningfully involve others, especially parents. Teachers described various struggles that could be interpreted as closely connected to the particular field site (school and school board) and the rules of operation within each. For instance, the Ministry of Education secures the principal's position in the school as the local manager whose duty is to ensure the IEP process is followed according to the government's standards for practice and expectations for teachers' behaviours.

In the end, the process rests with the classroom teacher. At the same time, the extent to which teachers in the process of professional learning and development, teachers' sense of self-efficacy came from their feelings of worth and importance that was acquired through the amount of professional development afforded them. I realized that for most participants, they associated their knowledge and skills with how they were positioned within the school hierarchy. Central to teacher satisfaction was the recognition of the role that a supportive school community of practice came into play both in terms of teachers' professional growth and their engagement in the actual development of the IEP. The culture of the school at the very least, had much to do with creating the community of practice in which teachers felt supported and through which a sense of collegiality among staff was promoted. This was meaningful to teachers' feelings of self-efficacy and satisfaction in two major ways – the value placed on teachers' knowledge and skill development (capital formation) related to the IEP process and the level at which teachers were able to engage with colleagues for

developing the IEP as part of the structuring practices and field mechanisms at work. Ultimately, supportive relationships and a caring school community seemed vital to teachers' practice, satisfaction, and to their ability to acquire and exchange valued capitals as Bourdieu would likely see it.

### **Concluding Comments**

What my discussion highlights is the current state of thinking, meanings, and practices that constitute the story of IEP development in Ontario's schools. As an educational practice, the IEP process can be seen to involve a system of internal logic and practices that teachers must grasp which inevitably result in meeting the interests of the school system. Visible in the research findings across all areas of IEP development were the (re)production and circulation of particular narratives that speak to the beliefs, perceptions, meanings, and pedagogical practices comprising the 'grand' narrative of individualized education that informs the work of teachers.

Research findings help to explain what is going on in the process of IEP development for students with IDD and offer important insight into the narrative accounts that explain how things are happening as they do in Ontario's elementary schools. In doing this research, I sought theoretical and plausible explanations about these underlying narratives that my theoretical approach adequately offered. My research indicates that conventional or traditional special education ways of thinking continue to permeate the IEP process and the pedagogical practices surrounding the phenomenon of disability in schools. In linking what teachers do and don't do in the

development of the IEP, the present study supports the view that the IEP process involves a complicated appropriation of meanings, dispositions, and practices.

The IEP development process creates the space for the voices of teachers to be heard about how they view students with disabilities and the educational outcomes required by these children. For me, there were moments of discomfort as their stories were entirely framed around the deficits of children and what these difficulties meant to teaching and instruction in the classroom. Notably, research findings reveal the ways in which the school system, as a social institution, powerfully guide teachers' thinking and practice. I am led to conclude that the IEP process is a multilayered and interconnected process rather than a discrete set of actions and steps. A thorough understanding of the IEP necessitates capturing the complexities involved in this process. In the end, I came to a place where I not only realized that the IEP was a means for constructing the student who requires special education, but more importantly, was the means through which teachers constructed their own world and identity in their attempt to reconcile disability and student differences within the classroom and school. And in this attempt, most definitively, disability theory and Bourdieu's thinking tools help to explain why and how this occurs in the field of education in Ontario. My final comment about the discussion of the research outcomes turns to this insightful thought:

Researchers of teachers' stories should be seeking to discover what teachers' stories inevitably conceal, rather than focusing on, and endorsing, what they pretend to reveal...they must find ways of helping teachers reflect on how their values [and beliefs] are actually realized in practice. (Convery, 1999, p. 140)



## **Chapter Summary**

This chapter discussed the outcomes of the research, presenting a descriptive interpretation of the data that tells the collective story of teachers' thinking and practice in the development of IEPs. In this discussion focus was placed on four major areas that brought together the research findings. These areas addressed the knowledge and conceptualizations involved in IEP development, the pedagogical orientations of individualized curricula, IEP pedagogy and practices, and key relational components found to affect the IEP process. Within the discussion, attention was given to the policy context, structural influences and embedded meanings that underpin the principal narratives shaping and informing teachers' work. The chapter illustrated that the beliefs and conceptualizations about students with IDD and their special educational needs are rooted in traditional medicalized modes of thinking about disability, deficiencies and deficits associated with disabled bodies to which the IEP becomes the documented response for addressing such issues. Included in this discussion was a consideration of influential factors that included how local school and school board culture along with classroom context impacted on teachers' work in developing IEPs.

Disability theory and Bourdieu's thinking tools were discussed as providing the theoretical framework used to encapsulate and bring into focus the complexity of the narratives embedded within the IEP development process and for looking at the particular meanings constructed about disability and special educational needs incorporated into IEP policy and practice. These theoretical insights were important for

providing alternative plausible explanations that considered the complexity of the data (Wolcott, 2009) and the underlying social and educational forces at work.

The discussion highlighted the personal accounts of teachers working in both regular education and special education classrooms to display the depth of perceptions and meanings that inform their thinking and actions. This involved a critical reflection on how issues of disability and difference are interpreted and organized for the purpose of IEP development. As this discussion showed, multiple factors interconnect to inform and direct the prevailing narratives that underpin the IEP development process. These were brought together to offer a holistic look at the data and the meanings that I took from the 'story' that was told. Finally, with the purpose and outcomes of the study in mind, the chapter concluded with my comments on the research and what was learned.

## Chapter 7

### Significance, Implications and Conclusions

*Educational landscapes shaped by stories  
might shape the stories of people living on them.*

(P. Steeves, 2006)

The purpose of this study was to examine the IEP development process for children with IDD across three district school boards in southwestern Ontario. This research sought to produce important knowledge to enhance an in-depth understanding and explanation of what happens in actual teacher practice. My contention in doing this research was that if one wants a clearer picture of how difference and disability is understood and responded to within school systems, and of the practices surrounding disability and special educational needs, inquiry into the IEP process is a most visible and practical means for achieving this objective. The critical assumptions that guided this research revolved around the argument that the process of IEP development was dominated by particular discourses and narratives. As a result, there were two primary aims for this study. The first was to examine how the macro narratives of educational documents informed the thoughts and practices of classroom teachers as they engaged in the IEP process. The second aim was to provide a detailed description of the micro-level narratives of classroom teachers that constructed the student as a learner and the individualized educational program created in response to the student's special educational needs.

In light of these discourses and narratives, the IEP process provides an important and valuable means for understanding the pedagogical stories that tell about the way in which the student with disability as the pedagogical subject plays out in the real world of the classroom and the identity assigned to the subject because of the IEP process. As Gabel (2002) suggests, the student as the subject is interpreted by others in the everyday world of the school. As such, teachers' accounts of their work in IEP development are instrumental for understanding the narratives that place the student on the school landscape and how the IEP process paints the student with disability into the pedagogical picture.

For this study, qualitative data were collected over a 6-month period and included semi-structured interviews with a selected sample of teachers supplemented by the review of institutional documents. Informal classroom observations were made to contextualize interview data. Research findings were based on a process of content and thematic analysis and took the form of textual descriptions of the major patterns and themes evidenced in the data. By exploring the narratives of classroom teachers as they talked about their thinking and work in this process and the metanarratives of relevant educational documents, certain conclusions can be drawn. Overall, outcomes of the research indicate the social and structural forces that explain how and why IEP development for students with IDD is viewed and performed within schools.

This study suggests that the development of IEPs is a common yet challenging practice for classroom teachers in the context of special education provision and classroom-based programming. Importantly, through the use of case study and narrative

research approaches, this study suggests that the IEP development process involves the interplay of key constructs and influential factors that shape and inform teachers' thinking and actions. Furthermore, conclusions to be drawn from the study suggest that the dynamic relationship between student disability, differences, and educational practice are in an ongoing and complex process of regulation and negotiation in which the IEP process plays a vital role.

### **Significance of the Research and Implications**

The importance of this research is that it has consisted of looking at the IEP development process for children with IDD as it operates in actual practice in Ontario's elementary schools. It sheds valuable insight on the underlying narratives that characterize IEP development and teachers' work in this process, bringing to the forefront the voices of classroom teachers. Embracing a qualitative research orientation, this study makes public the lives of teachers (Constas, 1992), their thoughts and practices, and their various modes of understanding that inform educational responses for students with IDD expressed through the IEP process. Drawing on disability and Bourdieu's critical social theoretical perspectives, important understanding and meanings come together to tell the story of the IEP process, what is really going on, why it is important, and the lessons learned (Lincoln & Guba, 1985).

The substantive significance (Patton, 2001) of this study lies in the larger meaning of the research as it tells the story of IEP development and illuminates how particular narratives and conceptualizations about students with IDD are (re)produced by educators through this special education process. Findings cast significant and critical

light on the IEP development process as a key social and political process at work in the field of education that produces dominant conceptualizations of disability and special education needs while constructing the particular disabled identity of the individual learner. Importantly, in that a theoretical understanding of the IEP seems limited, this research provides a move towards a theoretical understanding of the IEP process by drawing on disability and critical social theoretical perspectives. These perspectives show that IEP development, when conceptualized and examined in light of these theories, offers helpful insight into the social, political, and cultural forces at work in schools that have major implications for the ways in which educators respond to disability in education and incorporate inclusive educational practices. Further, these critical theories (Apple, 2010) are indispensable to raising questions about the part that the IEP process plays in the social and cultural reproduction of disability and of particular groups of students in the schooling system and to challenge the IEP process as it currently exists as an educational practice in Ontario's schools and elsewhere.

Importantly, the present study illustrates that IEP development cannot be solely explained in terms of simple procedures. Rather, the specifics of the data suggest there is a complexity of components and principal influential factors that shape and direct the IEP and the particular narratives that underpin its development by classroom teachers. Importantly, through this study, four key holistic areas were captured that speak to the complexities and influential factors that underpin the IEP process. In view of the study, this thesis advances key propositions about the IEP that propose there are particular sets of beliefs, meanings and practices that teachers adopt which are governed by common as

well as different logics. These logics can be accounted for by particular influences that include teacher characteristics, pedagogical orientations and practices, school and school board culture, and variances due to classroom settings. This research supports my position that the IEP process relies on traditional special education policy and pedagogical thinking that legitimates certain perceptions and understandings of students and mechanisms of categorization and special arrangements that are used to rationalize individualized curricular and outcomes.

Findings of the study provide deeper awareness of the extent of consensus, commonalities and discrepancies among teachers in developing IEPs for children with IDD. Acknowledging these consistencies and differences calls for asking why is this so? This study points to school and school board culture, classroom setting, policy contexts, and teacher efficacy, beliefs, perceptions and frames of reference as major explanatory factors. Study outcomes further highlight the institutional structuring processes in place that shape and influence how teachers engage in and think about IEP development for students with IDD. This research also sheds light on key barriers and challenges involved in the IEP development process such as teachers' work demands, the rigidity of the process, issues in the involvement of parents, students, family members, and other professionals, and the inconsistencies related to teachers' professional development.

It is my view that this research is significant for moving our awareness and understanding of the IEP process to a higher level, generating new and alternative insights into the IEP that contribute to the existing body of literature in special needs education, disability in education, and inclusive education. Pragmatically, this study has

important practical implications for informing educational policy, practice, teacher education, and future research. In moving from findings to action, key questions are highlighted as a result of this study that require further attention. Each involves implications for how human capacity is viewed and understood for the purpose of schooling, instruction, learning outcomes, and the development of individualized education programs. I discuss these implications and recommendations for further study below.

### *Policy*

The IEP process might be seen as a manifestation of the documentation culture that exists in educational policy and the neoliberal agenda that puts demands on educators to frame and record student learning according to performance measures and assessment records. This begs the question about how policy discourses are an advantage for or a barrier to the IEP development process within such an agenda as well as for fostering equitable and inclusive educational practices. At present, the policy context of the IEP remains entrenched in what I shall call limiting traditional special educational beliefs and practices. At the point of completing this study, policy directives and discourses concerning the IEP have stayed the same for essentially three decades in Ontario's education system. At the very least, procedural protocols have remained unchanged for fifteen years as the IEP Standards 2000 document illustrates. In other words, policy directing the IEP process and the provision of special education to a section of the student population with disability or 'special' needs has remained unchanged in a time when school systems claim to be increasingly progressive in the



equitable and inclusive learning of all students. Creating an inclusive school system necessitates rethinking the discourse and meanings of current policy on the IEP process.

An important consideration also to come out of this study and the work of other researchers is that “schools appear to *enact* rather than *implement* these policy demands, without critically considering *what* an IEP is and *how* it should be used in practice” (Andreasson et al., 2013, p. 413). This raises the need to critically examine the link between policy and practice and interpretations of professionals within the field of education as well as by practitioners from other fields outside of education.

### *Practice*

Notably, this research points to the pressing need for a more comprehensive understanding of how certain educational practices, such as the IEP process, may contribute to or perpetuate the marginalization and segregation of certain students. An important factor is the critical relationship between teachers’ understandings and assumptions about disability, special educational needs, and approaches taken to IEP development. A major point to be made is that rethinking the language and process of IEP development requires well-informed teachers. This study shows that teachers’ professional development needs are often unaddressed or ignored depending on a number of factors that tend to have much to do with school and school board priorities. Teachers and administrators require an in-depth understanding of IEP development as a negotiated process as well as of how a number of obvious as well as subtle factors impact on and affect their practices. To move forward in improving teacher practice, understanding these factors is essential.

In that a recurring finding was the process of naming deficiencies and impairments within a child for the purpose of IEP development, I refer to Goodley (2014) who states, “Disability is normatively understood through the gaze of medicalisation: that process where life becomes processed through the reductive use of medical discourse” (p. 4). Herewith is a key issue with current practice that this research supports. IEP development attends to “the ubiquitous individualisation of disability within the solitary individual” to make sense of the ‘other’ student in special education and draws on “the authoritative discourse of medicalisation” to inform its overarching narrative (p. 5).

Thus reductionist thinking and discourses are strongly intertwined with the overarching narrative of IEP development practices and the individualization of school programs. To rethink the learning identities of students with disability requires a change in the explanatory framework upon which educators base their thinking and practice. An implication for practice is to consider what if approaches to IEP development attended to more enabling and empowering versions of students based on capabilities and strengths to direct responsive forms of education rather than ableist ideals and disabling renderings to justify and explain individualized needs and educational programs.

From an inclusive education standpoint, it would appear that the IEP can act as a ‘gatekeeper’ for making available inclusive educational opportunities for students with intellectual developmental disabilities. This begs us to consider how practices involved in the IEP process facilitate or hinder inclusivity and equity in public education systems. In practice, important questions to be asked include (1) How does the IEP process help

or impede inclusive learning and student participation in classrooms?; and, (2) How can practices related to the IEP process be transformed to become less entrenched in traditional special education thinking and more aligned with progressive ways of thinking about disablement in education that comes from social model frameworks of disability?

### *Teacher Education*

It is clear to me that to move forward in inclusive education practice and thinking, new teachers need to be put in a position of advantage by engaging in meaningful and active learning about students with disability or exceptionality. This means being giving the opportunity to spend practicum time in classrooms in which they are able to gain authentic experience in the teaching and learning of students with disability and difference. This calls for restructuring teacher education programs so that not only is course work involved, but preservice teachers are required to actively participate in the teaching of students with disability. As noted, teacher participants consistently described their preservice teacher education programs as offering very little in terms of practical knowledge or training relevant to the IEP or to the teaching of students with disabilities. Therefore, practical implications emerge from this research that suggest the need to reconsider how teacher education programs address the IEP process, disability, and students with diverse educational needs. Preservice teacher education programs can play a significant role in creating well-informed educators who understand the IEP process and its connection to disability in education, to the exclusion or inclusion of students with special educational needs, and to social justice issues in

education. Importantly, there is the need for preservice programs to facilitate opportunities for teacher candidates to experience the IEP process in actual practice, and to question what this process looks like, involves, and to critically reflect on what the IEP means to their teaching practice. A further implication is that there is the responsibility of teacher education programs to develop a knowledge base through which new teachers come to understand how their perceptions and premises about students are instrumental to their professional practice and to the educational and life outcomes of students. This calls for teacher candidates to more fully understand how they will be active participants in the construction of students' identities based on the multiple perspectives and beliefs they adopt in practice.

A salient issue is identified by Grenfell (2010) who states that schools are "often seen as being essentially 'conservative' in that they tend to stay with existing ways of doing things whilst training institutions are 'progressive' in adopting and advocating the latest pedagogic methods" (p. 91). While this may be the case for teacher education programs in terms of general education practice, I am left feeling that both school systems and Faculties of Education have far to go in transforming how they approach and restructure special education so that teachers move forward in thought and action for addressing disablement in the context of inclusive education.

That said, transformative teacher education requires moving from deficit-based understandings of disability and student difference to social-model frameworks that emphasize the social and environmental circumstances of the student and how these are implicated in the disablement of the individual learner. To change how we view human

capacity in schools and learning outcomes that focus on capacity building, faculty in teacher education programs need to adopt course content that focuses on new ways of looking at disability that emphasize diversity in capacity and students' strengths as the basis of the IEP through and through which inclusive education is realized. All told, rethinking the IEP process so that it is transformative in meaning and practice requires building teacher awareness and knowledge about this process both within school settings and within institutions responsible for preparing new teachers. Otherwise, the IEP process will remain stuck in traditional understandings and viewpoints about students with disabilities and what their learning goals and outcomes are about while the education of the rest of the population moves forward.

### **Limitations Considered**

Certain limitations of the study have been given consideration. Bloomberg and Volpe (2012) point out that the nature of qualitative methodology in itself presents the possibility of limitations such as concerns about researcher's bias, subjectivity, and choices of data collected and analyzed. However, the very purpose of this study and the questions posed called for conducting a qualitative inquiry in which care was taken to acknowledge these possible limitations. As the researcher, I continually reflected on the research methods, the data collected, and my interactions with participants as the study proceeded. Certainly, the parameters of this study may be looked upon as a limitation in that the research focused only on Ontario elementary classroom teachers and IEP development for children who had been formally identified as exceptional pupils under the category of Intellectual: Developmental Disability.

In addition, external conditions imposed on the research might be considered as limiting the scope of the study. This included conditions that extended to conducting the research over a specific period of time during the school year as well as to the purposeful selection of classroom teachers as the research sample. I would have liked to have had the opportunity to extend my study over the course of a school year so to capture any changes to teachers' thinking and/or practices during the three periods of the school term in which IEP development or revision takes place. Given more time, my research might have been extended to doing follow-up interviews with participants to produce important longitudinal information about IEP development rather than a snapshot of teachers' work in this process.

### **Future Research and Questioning**

Based on the research results, my argument for further research into the IEP process extends to acknowledging the paucity of research that comprehensively addresses the usefulness and effectiveness of the IEP process. What has been learned from the research is that the IEP process involves a number of macro and micro level narratives that impact on teachers' beliefs, perceptions, and engagement in this process. As I contemplate the conclusions from the study that I am now in a position to render, certain next steps appear to be necessary to further questioning and inquiry into the IEP process and its broader implications to educational practice and policy.

As reminded by Wolcott (2009), it is crucial "to think of research as problem "setting" rather than problem "solving"" (p. 35). The present study serves to problem set, suggesting that there are inherent tensions and paradoxes involved in the IEP

process that require more inquiry. With this in mind, I see a number of possibilities for further research that come out of this study:

1. Future research could extend the present work by drawing on other relevant theories, such as the Foucauldian concepts of surveillance, individualization, normalization, exclusion, and concepts of classification and totalisation (Allan, 1996) that gives collective character to an individual based on membership of a larger social group (such as individuals with disability). Such perspectives have important potential for contributing to the critical study of the IEP process.
2. Additional in-depth study could be conducted through the use of institutional ethnography (Smith, 2005) as a sociological and critical approach to inquiry in order to extend an in-depth look at actual practices, the role of texts and discourses guiding educators' work, and the disjunctures that exist between policy and practice. Important critical insight could be gained by exploring further the ruling relations that are the linkages between institutional structures and policies, social and political discourses, and teachers' work.
3. There is a need to critically question the effectiveness of the IEP in general. Given that this research substantiates other studies that found teachers often feel the IEP has limited influence on their daily teaching and instructional practices, further inquiry is necessary to

determine the usefulness and relevancy of the IEP to teachers' daily instruction as well as to student learning across a range of students with exceptionalities. Moreover, a more explicit consideration of the effectiveness of the IEP process is required as it relates to the betterment of students' learning experiences and educational outcomes in the short term as well as in the long term.

4. An equally important area for study is to investigate the outcomes of teachers' professional learning experiences on their thinking and approaches to the development of IEPs. This would include questioning how professional development contributes to enhancing teachers' knowledge about incorporating inclusive educational plans that combine provincial curriculum goals with areas of individual skill development based on the particular needs of the learner.
5. Finally, while my qualitative research design precludes making generalizations about my findings, more research is required to explore the transferability of this study's findings to other classroom contexts and students with other disabilities or exceptionalities.

### **Research Reflections and Final Thoughts**

In that the IEP has remained largely unquestioned in the province of Ontario and in much of the special education, disability in education, and inclusive education research, my interest was to explore the questions I had come to have about the IEP process as an educator and doctoral researcher and to focus on this process in



relationship to children identified in the school system with IDD. It appears that few researchers have specifically questioned the IEP process in any theoretical or in depth way. I note that Thomas and Loxley (2007) make a valuable related point about research in special education and inclusive education by stating that critical questions need to be asked about the processes at work in society that lead to particular hegemonic and dominant conceptualizations and reproductions of special education, inclusion, and special educational need. Tomlinson (1987) takes a similar stance when she comments, "I have been concerned in my work in special education to use critical theories to question the part professionals and practitioners play in the social and cultural reproduction of a particular class in our society (p. 39). And Goodley and Roets (2008) argue that a task of critical educational researchers is to challenge "educational practices that create and recreate 'impairments' and associated labels (including special educational needs...)" (p. 243). Given the original research problem as stated in the introduction to the thesis, this study responds to all three challenges posed by these authors, making an important contribution to this critical research knowledge base.

The theoretical perspectives taken in the study offer a transformative space for the analysis of the IEP process. Importantly, linking pedagogy to social change and engaging the space of schooling as a site of contestation to replace established ideas and of possibility (Giroux, 2011) can lead to transformative possibilities and shifts in viewpoints about the IEP. Wacquant (1998) points out that Bourdieu's theoretical tools allow fruitful questions to be posed which enable us to see the social world and ourselves with new eyes. The transformative potential of these theoretical constructs lies

in producing a better understanding of “the role that schools and school systems play in reproducing social and cultural inequalities and legitimizing certain cultural practices” and thereby to improve the educational outcomes of disadvantaged students (Mills, 2013, p. 2).

The ideal of individualization has framed the rationale and spirit behind the concept of the IEP (Smith et al., 2009) and has guided special education policy and practice in Ontario for over three decades as educators respond to issues in the provision of meaningful and quality educational programs for students with disabilities. I bring in the point that perhaps “special education is not a solution to the ‘problem’ of disability, it *is* the problem, or at least one of the major impediments to the full integration of disabled people in society” (Linton, 2006, p. 161). As Ferri (2009) contends, critical reflection and examination of existing practices in special education that marginalize certain groups of students is called for so that we are pointed “toward a reimagining of dis/ability and recasting special education practice in ways that are more fully informed by an expanded notion of social justice” (p. 418). This study suggests the importance of understanding how the IEP fits into (re)producing traditional special education pedagogy and thinking in schools and potentially disguises the perpetuation of essentialist views of disability and special educational needs. It would appear that rather than disrupt the power differentials, the IEP may operate as one mechanism through which schools adhere to the interests of society and the dominant social group.

In Ontario and elsewhere, educational discourses speak to equity and inclusivity in education with no clear descriptions as to what this means for students with disability

and the IEP process as the educational response to disablement in schools and classrooms. As McLaughlin (2010) suggests, educational equity for students with disabilities must include students demonstrating academic achievement outcomes that commensurate with their same-age peers along with equal opportunity to be provided instruction in such academic outcomes. This study offers valuable information for looking at what can be done to transform the IEP development process so that it moves forward in the context of inclusive and equitable education. Thus, it encourages critical discussion about the purpose and effectiveness of the IEP process in the schooling of individuals with disabilities, about the meaning of educational equity in the context of individualized educational programs, about ways for moving beyond traditional notions of disability and definitions of exceptionality upon which the IEP process continues to rest, and about the ways in which the IEP process advances or hinders inclusivity in education for students with disabilities.

In writing this thesis, I shared my story as an educator to establish my presence in the research and to explain my professional experiences that brought me to the research issue and the questions asked. Foremost, as a special educator, I had come to see the IEP process as one that was not only intended to direct the schooling of students with special educational needs and ensure educators' responsiveness to student exceptionality and difference in learning, but also as a process that involved hidden meanings and agendas that were largely invisible. My belief was that the IEP process is being used as a powerful tool for denoting student difference and is susceptible to being used to legitimize forms of marginalization and exclusion of students because of

disability. What I also believed was that the institutional discourses and narratives of teachers used in the IEP process fueled certain beliefs about students and their educational needs that were vital to how children were seen and positioned in the school and classroom. It became clear for me that teachers were engaged not only in the ongoing construction of disability and the meaning of special educational needs, but the identities of students as learners through the IEP process.

Hence, this study was very much about the power of the story that gets told and retold about children with IDD in schools and classrooms as a result of the IEP process. Gee (2005) does remind us that stories are not static or decontextualized events but dynamic constructions shaped by one's past and present experiences embedded in one's context. Thus, the study offers important insight into the particular discourses that get articulated about students with disability and their education through the IEP. It sheds critical light on the pedagogical ideal of how school institutions and society want education to function for children with disabilities or special educational needs and moreover, how children are to be and exist in schools and classrooms.

Through this research, we enter into a deeper realization of what is involved in the process of developing IEPs to better understand how school systems can reconcile disability, difference, equity and inclusivity through the IEP process but in ways that are transformative. As caring and progressive educators, we must identify the discourses that persist in constructing students with disabilities in specific ways, and thus, what students are to learn, can learn, and are able to be a part of in their schooling experiences. To transcend the narratives of limitations and separateness in education

involves recognizing and understanding the multi-layered dispositions, discourses, and practices which students with disabilities are likely to confront and be trapped by within the schooling system. It is hoped that through this study attention is drawn to the forces, factors, and narratives that operate within the IEP process in schools to construct children as different and separate learners. Further is the need to seriously consider how and why, for so many students, their school story is being shaped and narrated by the IEP. My closing thought is that to move forward, we need transformative approaches to the IEP process that work towards bringing about inclusivity and equity in education while understanding and respecting the student with disability as an individual learner.

It was a great satisfaction to learn and know more, it helped to ease one over a lot of puzzling matters...it brought, too, the first taste of complications from which we would never again be free. Quite quickly it became difficult always to remember how much one was supposed to know. It called for a lot of restraint to remain silent in the face of simple errors, to listen patiently to silly arguments based on misconceptions, to do a job in a customary way when one knew there was a better way...

*The Chrysalids*, John Wyndham, 1955

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## Appendix A

### Definitions of Key Terminology

#### **Alternative Program:**

An alternative program is described by the Ontario Ministry of Education as a special education program for a student that is not based on the learning goals and expectations of the Ontario Provincial Curriculum. Alternative expectations replace those of the provincial curriculum when it has been determined by the school that the needs of the student cannot be met through the regular curriculum. Therefore the Ontario curriculum no longer forms the basis of the student's educational program. Learning expectations in the areas of behaviour, communication, life skills and orientation and mobility are examples of expectations constituting an alternative education program outlined in an IEP (*Ontario Ministry of Education Individual Education Plans: Standards for Development, Program Planning, and Implementation 2000*)

#### **Exceptional Pupil (Exceptional Student):**

Under the Ontario *Education Act* (R.S.O. 1990, s.1.), an exceptional pupil is a student with special education needs who requires placement in a special education program that includes an IEP, due to one or more identified behavioural, intellectual, communicative, or physical need(s), or who needs placement in a special education program because of the risk of school failure. The *exceptional* pupil is identified as either (1) belonging to one of the Ontario Ministry of Education's five categories of exceptionality: behaviour, intellectual, communication, physical, or multiple, and/or as (2) requiring a special education program and/or specialized supports and services in order to learn (*Education Act*, R.S.O. 1990, c.E.2; O. Reg. 181/98, s.6(3), s.6(4)). This concept of the "exceptional pupil" differs from the idea of a student with a "handicap" under the *Ontario Human Rights Code*. A student with a handicap may or may not require placement in a special education program but is entitled to receive

accommodations and services free of discrimination because of handicap (Bowlby et al., 2001, p. 39).

***Identification, Placement and Review Committee (IPRC):***

The Education Act of Ontario (1990) establishes the IPRC process as the means to be used by each school board in Ontario to identify a student as an exceptional pupil under one of the Ontario Ministry of Education “Categories of Exceptionality”. The categories of exceptionality recognized in the Education Act are: behaviour; communication; intellectual; physical; and multiple. The IPRC also is used to determine the placement of the student in a special education program within a regular classroom, resource withdrawal program, or special education classroom setting and includes an IEP. All students who have been identified as exceptional pupils through an IPRC are mandated to have an IEP that sets out the special education program. The IPRC reviews the student’s placement at least once every school year (*Education Act of Ontario, R.S.O. 1990, O. Reg. 181/98, s. 6(3)*).

***Individual Education Plan (IEP):***

The Ontario Ministry of Education states that the IEP is a planning, communication and document that is designed to meet the identified strengths and needs of the student. The IEP reflects the school board’s and the principal’s commitment to provide the special education program and services required by the student within the resources available to the school board. The IEP is defined by the Ministry as:

[A] written plan describing the special education program and/or services required by a particular student. It identifies learning expectations that are modified from or alternative to the expectations given in the curriculum policy document for the appropriate grade and subject or course, and/or any accommodations and special education services needed to assist the student in achieving his or her learning expectations. The IEP is *not* a daily lesson plan itemizing every detail of the student’s education. The IEP also helps teachers monitor the student’s progress and provides a framework for communicating

information about the student's progress to parents (and guardians) and to the student. The IEP is updated periodically to record any changes in the student's special education program and services that are found to be necessary as a result of continuous assessment and evaluation of the student's achievement of annual goals and learning expectations. (IEP Standards 2000, p. 3)

The IEP is used by the classroom teacher to monitor and report student progress. At the heart of the IEP are measurable learning expectations. The development, implementation, and monitoring of the IEP is regulated through guidelines established by the Ontario Ministry of Education in accordance with Regulation 181/98 of the Education Act of Ontario. (*Ontario Ministry of Education Individual Education Plans: Standards for Development, Program Planning, and Implementation, 2000; The Individual Education Plan (IEP): A Resource Guide 2004, Ontario Ministry of Education*).

### **Intellectual: Developmental Disability (IDD):**

Intellectual: Developmental Disability is defined by The Education Act of Ontario (1990) as a severe learning disorder characterized by: (a) an inability to profit from a special education program for students with mild intellectual disabilities because of slow intellectual development, (b) an inability to profit from a special education program that is designed to accommodate slow intellectual development, and (c) a limited potential for academic learning, independence, social adjustment, and economic self-support. A diagnosis of intellectual disability is based on (1) measures of cognitive functioning lower than 2 standard deviations below the mean therefore an IQ of 70 and below, and, (2) significant areas of weaknesses in at least two critical areas of adaptive functioning such as in communication, social skills, self-care skills, functional academic skills, as outlined in DSM-IV Criterion B. The *Diagnostic and Statistical Manual of Mental Disorders* (DSM-IV, 1994 and 2000) refers to intellectual disability as mental retardation and states:

The essential feature of mental retardation is significantly sub-average general intellectual functioning (Criterion A) that is accompanied by significant

limitations in adaptive functioning in at least two of the following skills areas: communication, self-care, home living, social/interpersonal skills, use of community resources, self-direction, functional academic skills, work, leisure, health, and safety (Criterion B). The onset must occur before age 18 years (Criterion C). Mental retardation has many different etiologies and may be seen as a final common pathway of various pathological processes that affect the functioning of the central nervous system. (p. 39; p. 41)

(American Psychiatric Association (APA))

**Special Education Program:**

Under the *Education Act of Ontario, Regulation 181/98*, a special education program is defined as a program that is necessary for a student because of an identified exceptionality and/or because it has been determined that a student can benefit from such a program. A special education program “includes a plan containing specific objectives and an outline of educational services that meet the needs of the exceptional pupil.” This plan is the *Individual Education Plan (IEP)*. A special education program is based on and modified by the results of continuous assessment and evaluation (*Education Act, R.S.O., 1990, c.E.2 (as amended), s. 1(1)*).



## Appendix B

### Components of Individual Education Plan Process

<p><b>1. Information Gathering/Knowledge Sources</b></p> <ul style="list-style-type: none"> <li>○ Review student records.</li> <li>○ Consult with parents, student, school staff, other professionals.</li> <li>○ Observe student.</li> <li>○ Conduct additional assessments.</li> <li>○ Consolidate and record information.</li> </ul>
<p><b>2. Plan Direction for Development</b></p> <ul style="list-style-type: none"> <li>○ Establish an approach that is collaborative with IEP team.</li> <li>○ Define roles and responsibilities of IEP team members.</li> <li>○ Begin development of IEP: record reason for the IEP, record personal information of the student, identify and list relevant assessment data.</li> <li>○ List student's areas of strengths and needs based on IPRC's statement of</li> </ul>
<p><b>3. Development of IEP</b></p> <ul style="list-style-type: none"> <li>○ Development relates to student's special education program, services and supports required.</li> <li>○ Classify subject areas, areas of alternative program.</li> <li>○ Determine accommodations necessary.</li> <li>○ Plan and document modified expectations for subject areas; plan and record alternative programs.</li> <li>○ Document teaching and assessment strategies.</li> <li>○ Plan and document human resources required.</li> <li>○ Record information about evaluation, reporting, provincial assessments.</li> <li>○ Plan and document transition planning strategies.</li> <li>○ Record information about IEP development phase (parent/student</li> </ul>
<p><b>4. Implement the IEP</b></p> <ul style="list-style-type: none"> <li>○ Share IEP with parent, student, school staff, other professionals; provide copy to parents.</li> <li>○ Put IEP into practice. Continually assess student. Adjust IEP as necessary. Evaluate learning. Report to parents.</li> </ul>
<p><b>5. Review and Update IEP</b></p> <ul style="list-style-type: none"> <li>○ At beginning of each reporting period update learning expectations.</li> <li>○ Regularly review and revise IEP. Store IEP in Ontario Student Record file</li> </ul>

Adapted from: *The Individual Education Plan (IEP): A Resource Guide* 2004. Ontario Ministry of Education, Toronto. <http://www.edu.gov.on.ca>

## Appendix C

### Teacher Letter of Information and Consent Form

Research Project: *Individual Education Plan (IEP) Development for Children with Developmental Disabilities in Ontario's Schools*

Western Education

Dear Participant:

My name is Karen Gregory and I am a doctoral candidate at the Faculty of Education, Western University, London, Ontario. I am currently conducting research into the special education practice of Individual Education Plan (IEP) development for elementary students with intellectual developmental disabilities in Ontario's public school system. I would like to invite you to be a participant in this research.

My aim is to investigate teachers' understandings of students with developmental disabilities and the meaning of special educational needs for this group of students when developing IEPs. The purpose of this research is to examine the beliefs and understandings of teachers about students as well as the factors that influence their understandings for IEP development. Each participant for this study will be a full time elementary classroom teacher working in either a regular classroom or a self-contained special education classroom setting and who has at least five years of teaching experience in Ontario. Each participant will be the current teacher of a student(s) with developmental disability and responsible for the development and implementation of the student's IEP.

If you agree to participate in this study, you will be asked to agree to my visiting your classroom for up to half a day to meet you and to become familiar with your teaching setting and classroom. During this visit, I may ask you about any Ontario Ministry of Education or school board resources that you use in the development of IEPs. No data will be collected or field notes taken about your students, their learning or their reactions to you in the classroom. My interest is to informally observe your classroom in order to learn about your teaching situation. Following this observation period, you will be asked to participate in a 60 minute face to face interview that will be audio-recorded. This interview will be conducted either at your school or at a location that is most convenient for you and at a mutually agreed upon time. As follow-up to the interview, you may be asked to respond to questions through email contact or telephone calls for the purpose of clarifying your responses.

All information collected will be kept confidential and used for research purposes only. Your name, school site, and any other information that could identify you will be kept confidential and will not be used in the writing of my thesis or in the public sharing of research results through publications or presentations of the research. The use of pseudonyms will be used at all times during the research process and for writing my report of research findings. All data will be destroyed 5 years after publication of the research.

Your principal and perhaps others in your school board will know of your involvement in this research because of visiting your classroom and conducting the interview on site at your school. However there are no known risks to participating in this study. In no way will my informal observation of your teaching environment or any research findings be used as a means for evaluation of teaching practices.

Your participation in this study is voluntary. You may refuse to participate, refuse to answer any questions and are free to withdraw from this study at any time with no effect on your employment status. Your consent will be ongoing however it may not be feasible to withdraw any data already provided if you are unable to continue.

If you have any questions about your rights as a research participant you may contact the Office of Research Ethics, Western University at.....  
If you have any questions about the study you may contact me at .....  
or my faculty advisor, Dr. Jacqueline Specht at .....

This letter is yours to keep for future reference. Thank you for considering participation in this study.

Sincerely,

Karen Gregory, Ph.D. Candidate,  
Faculty of Education, Western University, London, Ontario

Western Education

### Consent Form

**Title of Research Project:** *Individual Education Plan (IEP) Development for Children with Developmental Disabilities in Ontario's Schools*

**Name of Researcher and Affiliation:**

Karen Gregory, Ph.D. Candidate  
Faculty of Education, Western University, London, Ontario

**Research Supervisor:**

Dr. J. Specht,  
Faculty of Education, Western University, London, Ontario

I have read the Letter of Information, the nature of the study has been explained to me and I agree to participate. All questions have been answered to my satisfaction.

**Name** (please print):

---

**Signature:**

**Date:** (day/month/year)

---

**Person Obtaining Informed Consent:** Karen Gregory

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Appendix D**  
**Participant Demographics**

(Note. Chart continues on next page)

<b>Name</b>	<b>M /F</b>	<b>Age Range</b>	<b>School Setting</b>	<b>Classroom Setting</b>	<b>Grade Level</b>	<b>Teaching Qualifications</b>	<b>Years Teaching</b>	<b>Related Experience</b>
Nancy	F	40-50	rural	Regular classroom	Gr. 1/2	B.Ed; AQ Courses Special Education Part 1; Blind 1&2	7 years	EA/Itinerant Teacher
Lily	F	30-40	town	Regular classroom	Gr. 3/4	B.Ed	5 years	Resource/ Special Education Class
Drew	M	30-40	small city	Special Education classroom	Intermediate	B.Ed; AQ Course Special Education Part 1 & 2	5 years	
Sarah	F	40-50	small city	Regular classroom	Gr. 7	B.Ed; AQ Course Special Education Part 1	17 years	Resource / Special Education Class
Hannah	F	30-40	rural	Regular classroom	Gr. 7/8	B.Ed; AQ Course Special Education Part 1	9 years	
Barb	F	30-40	town	Special Education classroom	Junior/ Intermediate	B.Ed; Diploma Developmental Service Worker	5 years	Community Agency/ Regular Class
Wilma	F	40-50	urban	Special Education classroom	Junior	B.Ed; AQ Course: Special Education Part 1, 2, 3	14 years	Regular classroom/ Acting VP
Cathy	F	30-40	town	Special Education classroom	Intermediate	B.Ed; AQ Course: Special Education Part 1, 2, 3	8 years	EA; Regular Classroom

Name	M / F	Age Range	School Setting	Classroom Setting	Grade Level	Teaching Qualifications	Years Teaching	Related Experience
John	M	30-40	small city	Special Education classroom	Intermediate	B.Ed; AQ Course Special Education Part 1	8 years	Community Agency
Rachel	F	40-50	urban	Regular classroom	Gr. 4	HBA in Child Studies; B.Ed; AQ Special Education Part 1 & 2	18 years	International School (7 yrs.)
Daisy	F	50-60	small city	Special Education classroom	Junior/ Intermediate	B.Ed; AQ Course Special Education Part 1 & 2	16 years	Secondary
Mandy	F	50-60	rural	Regular classroom	Gr. 5/6	B.Ed; Diploma Developmental Service Worker	15 years	Community Agency/ EA
Kate	F	50-60	urban	Special Education classroom	Primary	B.Ed; AQ Courses- Special Education Part 1,2,3; Specialist in Primary Education	27 years	
Mary	F	40-50	urban	Special Education classroom	Primary	B.Ed; AQ Course Special Education Part 1, 2, 3	20 years	Secondary Developmental Education Class

\*Rural = country setting;

Town = population under 10,000

Small City = population under 60,000;

Urban = population over 60,000

\*\*Early career = 0-7years; Middle career = 8-23 years; Late career =24+ years

(Source: Day et al., 2008)

## **Appendix E**

### **Classroom Observation Guide**

**Researcher:** Karen Gregory, Ph.D. Candidate, Faculty of Education, Western

#### **Dimensions of Field Observations:**

1. Role of the researcher: onlooker observer, nonparticipant, unobtrusive observations
2. Disclosure of the researcher's role: full disclosure of the researcher's role in observing classroom setting and recording information
3. Duration of observation: short, single informal observation of classroom site for 1 hour to a maximum of 3 hours
4. Focus of observations: broad focus, holistic view of physical and social setting of the classroom environment
5. Recording observational data: observations recorded by taking descriptive, dated field notes based on what the researcher believes is worth noting for understanding the classroom context, for informing interview questions specific to the participant's local teaching situation, and for assisting recall, analysis and interpretation of information gathered from participants
6. Guiding questions for observation:
  - a) Description of physical setting:
    - i. What can be learned about the physical environment of the classroom in which the participant works which may influence IEP development and implementation?
    - ii. What descriptive information about the classroom setting will help in understanding the teacher's interview responses and narratives?
    - iii. What details will help the researcher to recall and visualize the setting and will assist in understanding and interpreting data? (description of classroom space such as a 40 foot by 30 foot classroom with windows along one side and students' coat rack along the other side,

back of the room lined with book shelves, work tables arranged in the centre of the room, student work displayed on bulletin board along back wall; row of computers for use by students arranged at front of room).

b) Description of social environment:

- i. How is classroom structured? (schedules, routines, student groups, buddies, centres)
- ii. What are some patterns of social interactions? (nature of informal interactions, others in the classroom interacting with or supporting students).

c) Description of local nuances and terminology:

- i. What important comments or terms does the participant use that could relate to IEP development practices and/or processes?
- ii. What are the participant's own words that can be used to help capture their views and experiences? (participant's comments recorded in quotation marks; precise language noted to assist with interviewing, transcription, and analysis and interpretation of data)



**Appendix F**  
**Teacher Interview Guide**

Do you have any questions before we begin?

**Professional Teaching Background:**

1. How long have you been teaching? Do your teaching qualifications include any special education qualifications?
2. What prior experience before this year have you had teaching students with the exceptionality of IDD?

**IEP Knowledge:**

3. How would you describe your knowledge about the IEP and its development?
4. How have you acquired the skills for developing IEPs using your school board's IEP template? (e.g. board training, in school support)

**IEP Development:**

I'd like to focus now on IEP development.

5. First, I'd like to ask you about what are the most important insights or aspects about the nature of developmental disability that inform the development of the IEP for you?
6. In what ways would you say Ministry of Education categories of exceptionality and policies direct how you view the student with the exceptionality of Intellectual: Developmental Disability for developing an IEP?

7. In what ways do school board resources or documents influence how you view the student?
8. When you think about students' strengths and the meaning of special educational needs, what comes to mind for developing the IEP?
9. What can you tell me about the ways you prioritize the curricula content for your students that would be written in the IEP? What is the most important for your students?
10. How do you go about setting the specific IEP goals and learning expectations for your students? Can you describe for me what you do?
11. How do Ministry of Education and your school board's documents help you or influence the way you develop the IEP?
12. How does your classroom setting influence the program that you write in the IEP for the student(s)?
13. How is the Ontario Curriculum included or addressed in the student's individualized education plan?
14. What sources of information about the student do you rely on for developing the IEP?
15. How are others in the student's life such as parents, therapists, involved in developing the IEP? In what ways would you say does their input affect your decision-making about what goes into the IEP?

16. Tell me something about how you monitor and assess the progress of the student(s) according to their IEP goals and expectations?
17. Based on your experience, what challenges or conflicts do you face in developing the IEP for the student?
18. If you had to summarize what constitutes effective IEP development and a good IEP, what would you say?

I just have a few more questions.

19. In your opinion, how useful is the IEP to the daily instruction, participation and learning of the student?
20. If you could tell me one good thing and one problem with the current IEP format and/or its development, what would you say?

Your input has been most valuable. My final question is to ask you if there is anything else you would like to share about your thoughts or experiences in developing the IEP?

## Appendix G

**Western Education**  
**WESTERN UNIVERSITY**  
**FACULTY OF EDUCATION**  
**USE OF HUMAN SUBJECTS - ETHICS APPROVAL NOTICE**

Review Number: 1305-1  
 Principal Investigator: Jacqueline Specht  
 Student Name: Karen Gregory  
 Title: *Individual Education Plan Development for Children with Developmental Disabilities in Ontario's Schools*  
 Expiry Date: April 30, 2014  
 Type: Ph.D. Thesis  
 Ethics Approval Date: May 21, 2013  
 Revision #:  
 Documents Reviewed &  
 Approved: Western Protocol, Letter of Information & Consent

This is to notify you that the Faculty of Education Sub-Research Ethics Board (REB), which operates under the authority of the Western University Research Ethics Board for Non-Medical Research Involving Human Subjects, according to the Tri-Council Policy Statement and the applicable laws and regulations of Ontario has granted approval to the above named research study on the date noted above. The approval shall remain valid until the expiry date noted above assuming timely and acceptable responses to the REB's periodic requests for surveillance and monitoring information.

During the course of the research, no deviations from, or changes to, the study or information/consent documents may be initiated without prior written approval from the REB, except for minor administrative aspects. Participants must receive a copy of the signed information/consent documentation. Investigators must promptly report to the Chair of the Faculty Sub-REB any adverse or unexpected experiences or events that are both serious and unexpected, and any new information which may adversely affect the safety of the subjects or the conduct of the study. In the event that any changes require a change in the information/consent documentation and/or recruitment advertisement, newly revised documents must be submitted to the Sub-REB for approval.

### Dr. Alan Edmunds (Chair)

#### *2012-2013 Faculty of Education Sub-Research Ethics Board*

Dr. Alan Edmunds	Faculty of Education (Chair)
Dr. John Barnett	Faculty of Education
Dr. Wayne Martino	Faculty of Education
Dr. George Gadanidis	Faculty of Education
Dr. Elizabeth Nowicki	Faculty of Education
Dr. Julie Byrd Clark	Faculty of Education
Dr. Kari Veblen	Faculty of Music
Dr. Jason Brown	Faculty of Education
Dr. Susan Rodger	Faculty of Education, Associate Dean, Research ( <i>ex officio</i> )
Dr. Ruth Wright	Faculty of Music, Western Non-Medical Research Ethics Board ( <i>ex officio</i> )
Dr. Kevin Watson	Faculty of Music, Western Non-Medical Research Ethics Board ( <i>ex officio</i> )

The Faculty of Education 1137 Western Rd. London, ON N6G 1G7	Faculty of Education Building <a href="mailto:edu-ethics@uwo.ca">edu-ethics@uwo.ca</a> 519-661-2111, ext.88561 FAX 519-661-3095
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## Appendix H

### List of Educational Documents

Author	Title and Date of Publication	Type of Document
Ontario Ministry of Education	<ul style="list-style-type: none"> <li>○ Regulation 181/98 of the Education Act of Ontario (last amendment 2005)</li> </ul>	Legislative
	<ul style="list-style-type: none"> <li>○ Individual Education Plans: Standards for Development, Program Planning, and Implementation 2000</li> </ul>	Policy Protocol
	<ul style="list-style-type: none"> <li>○ The Individual Education Plan (IEP): A Resource Guide 2004</li> </ul>	Resource Document
District School Board A	<ul style="list-style-type: none"> <li>○ Special Education Report/ The Individual Education Plan 2012-2013</li> </ul>	Report
District School Board B	<ul style="list-style-type: none"> <li>○ Special Education Report 2013-2014</li> </ul>	Report
District School Board C	<ul style="list-style-type: none"> <li>○ Board Mission Statement/Special Education 2012-2013</li> </ul>	Report

## Appendix I

### Coding Scheme: Analysis of Educational Documents

Category/Code	Sub-category / Sub-code	Sub-code codes	Meaning Use of Code
<p><b>Document Context/ Policy Environment</b></p> <p><b>CNTXT</b></p>	<p>1.Document Type</p> <p>2.Purpose/Function</p> <p>3.Audience</p> <p>4.Authorship/Origin</p> <p>5.Intended Focus</p>	<p><b>1.Document Type</b></p> <p>1a) Legislation</p> <p>1b) Policy</p> <p>1c) Memorandum</p> <p>1d) Guideline</p> <p>1e) Resource</p> <p>1f) Report</p> <p>1g) Public Information</p> <p><b>2.Purpose/Intent</b></p> <p>2a) legislative / regulative</p> <p>2b) guideline / supportive</p> <p>2c) resource</p> <p>2d) informative / descriptive</p> <p><b>3.Intended Audience</b></p> <p>3a) school board</p> <p>3b) principals / teachers</p> <p>3c) parents / guardians</p> <p>3d) general public</p> <p><b>4.Authorship/Origin</b></p> <p>4a) Provincial Government / Ministry of Education</p> <p>4b) School Board</p> <p>4c) Other</p> <p><b>5.Intended Focus</b></p> <p>5a) governance / compliance</p> <p>5b) consistency of practice</p> <p>5c) accountability</p> <p>5d) improvement</p> <p style="padding-left: 20px;">i. professional practice</p> <p style="padding-left: 20px;">ii. student learning</p>	<p>This code applies to identifying the context of the document, the type of document, its primary purpose, authorship of the document, the intended audience for the document, and the intended focus of the document.</p> <p>Intended focus of document, its underlying intent narrated such as for accountability of school boards, to bring consistency to teacher practice or school practices in program delivery.</p>

<p><b>Ideology/ Explanatory Discourse</b></p> <p><b>EXPDIS</b></p>	<p>1.Ethical/Moral Argument</p> <p>2.Legislative/Rights Argument</p> <p>3.Logical/Rational Argument</p> <p>4.Emotional Argument</p>	<p><b>1.Ethical/Moral</b> 1a) all students served 1b) individual student served</p> <p><b>2.Legislative/Rights</b> 2a) student rights 2b) rights of school</p> <p><b>3.Logical/Rational</b> 3a) student centered 3b) teacher centered 3c) school centered 3d) school board centered</p> <p><b>4.Emotional</b> 4a) cultural value 4b) public interest 4c) historical/ political</p>	<p>Applies to wording, passages and segments of text that is rhetorical; wording used to convey the document’s use of particular narratives to appeal to a form of argument.</p>
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<p><b>School Board and School Culture</b></p> <p><b>SCH/BDCULT</b></p>	<p>1. Roles and Responsibilities</p> <p>2. Supports and Resources</p> <p>3. Leadership</p> <p>4. Collective Belief</p>	<p><b>1.Roles and responsibilities</b> 1a) Teacher 1b) Principal 1c) Parent / Guardian 1d) School Team 1e) Student 1f) School Board 1g) Other</p> <p><b>2.Supports and Resources</b> 2a) human support 2b) professional development 2c) materials / technology</p> <p><b>3.Leadership</b> 3a) school-based 3b) school board based</p> <p><b>4.Collective Belief</b> 4a) mission statement 4b) value statement</p>	<p>Applies to units of text describing the roles and responsibilities related to various school and school board personnel, and other stakeholders involved in the education of the student; coding of text that mentions areas of support in the IEP process including training / skill development. Identify text describing leadership provided in IEP development.</p> <p>Applies to text that refers to overarching beliefs/values in provision of special education.</p>
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<p><b>Conceptualization/ Classification</b></p> <p><b>CONCPT</b></p>	<ol style="list-style-type: none"> <li>1.Disability/ Exceptionality</li> <li>2.Student characteristic</li> <li>3.Special educational need</li> <li>4.Special education purpose</li> </ol>	<p><b>1.Disability /Exceptionality</b></p> <ol style="list-style-type: none"> <li>1a) within student condition</li> <li>1b) outside student</li> <li>1c) both within &amp; outside student</li> </ol> <p><b>2.Student Characteristic</b></p> <ol style="list-style-type: none"> <li>2a) deficit/deviance/ deficiency</li> <li>2b) strength/ capability</li> <li>2c) atypical/ abnormal</li> </ol> <p><b>3.Special Education Need</b></p> <ol style="list-style-type: none"> <li>3a) student learning need</li> <li>3b) teaching / instruction</li> <li>3c) service/support</li> <li>3d) environment adaptation</li> </ol> <p><b>4.Special Education Purpose</b></p> <ol style="list-style-type: none"> <li>4a) separate instruction</li> <li>4b) inclusionary instruction</li> <li>4c) specialized outcomes</li> <li>4d) distribution of special services or supports</li> </ol> <p><b>5.Individualization</b></p> <ol style="list-style-type: none"> <li>5a) provincial curriculum <ol style="list-style-type: none"> <li>i. differentiation</li> <li>ii. modification</li> <li>iii. accommodation</li> </ol> </li> <li>5b) alternative program</li> <li>5c) environment adaptation</li> <li>5d) supports &amp; services</li> </ol>	<p>Applies to words, units of meanings and passages of text that speak to how exceptional and /or disability are viewed; the rules for exceptionality classification, perceptions of disability causes, labels assigned; explanations of student traits such as deficient, deviant, lagging skills, from normal development.</p> <p>Code words used to denote difference in educational needs and perceptions of special needs of students.</p> <p>Code references to the purpose of special education.</p> <p>Include conceptual text used to narrate the meaning of the individualized education program, and focus of individualized program.</p>
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<p><b>IEP Development Practice</b></p> <p><b>IEPDEV</b></p>	<ol style="list-style-type: none"> <li>1. Educator expertise</li> <li>2. Student information source</li> <li>3. Goal setting</li> <li>4. IEP management</li> </ol>	<p><b>1.Educator Expertise</b></p> <ol style="list-style-type: none"> <li>1a) IEP Knowledge</li> <li>1b) IEP Skills</li> </ol> <p><b>2.Source of Student Information</b></p> <ol style="list-style-type: none"> <li>2a) OSR documentation</li> <li>2b) assessments</li> <li>2c) school staff</li> <li>2d) school board staff</li> <li>2e) parent /family</li> <li>2f) community professional</li> </ol> <p><b>3.Goal Setting</b></p> <ol style="list-style-type: none"> <li>3a) deficits focus</li> <li>3b) strengths focus</li> <li>3c) both deficits and strengths</li> <li>3d) instruction</li> <li>3e) supports</li> </ol> <p><b>4.IEP Management</b></p> <ol style="list-style-type: none"> <li>4a) practice</li> <li>4b) role</li> <li>4c) purpose</li> </ol>	<p>Applies to text that narrates a description of practices and procedures involved in developing the IEP; references to skills required by educators; includes references to sources of student information used in developing the IEP.</p> <p>Text referring to the focus of the school program based on an IEP; excludes text focused on implementation of the IEP unless data is applicable to the development of the IEP such as gathering information for planning revisions to the IEP. Code for text that refers to specific processes in managing the IEP.</p>
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<p><b>Collaborative Practice</b></p> <p><b>COLLAB</b></p>	<ol style="list-style-type: none"> <li>1.Inter-professional collaboration</li> <li>2.Parents/ family collaboration</li> </ol>	<p><b>1.Inter-professional Collaboration</b></p> <ol style="list-style-type: none"> <li>1a) teachers</li> <li>1b) school team</li> <li>1c) school administration</li> <li>1d) school board</li> <li>1e) community agency</li> <li>1f) other</li> </ol> <p><b>2.Parent / Family Collaboration</b></p> <ol style="list-style-type: none"> <li>2a) parent/guardian</li> <li>2b) student</li> <li>2c) family members</li> </ol>	<p>Applies to meaning units of text that mentions or describes involving others in the IEP development process. Code text that mentions actions to be taken for information gathering, input from others.</p>
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## Appendix J

### Coding Scheme for Analysis of Interview Data

(P) = predetermined category      (E) = emergent category/theme

Category	Sub-categories / Sub-codes	Sub-code codes	Meaning / Use of Codes
<p style="text-align: center;"><b>Teacher Professional Background (P) PROFBGD</b></p> <p>(relates to Bourdieu's concepts of <i>habitus, field, symbolic capital, cultural capital</i> (formal education, qualifications, exposure to a specialized social habitus such as university and social networks in teaching; the teacher as the social agent; acquired capital of the teacher gets expressed in the form of habitus (dispositions and attitudes, knowledge of the 'rules of the game' and dominant principles of the field (school system)</p>	<ol style="list-style-type: none"> <li>1. Basic Teaching Qualifications</li> <li>2. Teaching experience</li> <li>3. Additional relevant experience</li> <li>4. Additional relevant training or qualifications</li> </ol>		<p>Code if mention of teacher education program and degree, years teaching, other professional experience relevant to teaching, other relevant coursework, certifications or qualifications.</p> <p>Exclude comments about volunteer work, work unrelated to teaching.</p>
<p style="text-align: center;"><b>Context/Setting (P) CNIXT</b></p> <p>(relates to Bourdieu's <i>Field Theory</i> agent acting within a particular field or site; thinking relationally in terms of time, place and the research phenomena (IEP development)</p>	<ol style="list-style-type: none"> <li>1. Grade level</li> <li>2. Classroom setting</li> <li>3. School Community</li> </ol>	<p><b>1. Grade level</b> 1a) Gr. 1-3 Primary 1b) Gr. 4-6 Junior 1c) Gr. 7-8 Intermediate</p> <p><b>2. Classroom setting</b> 2a) Regular class 2b) Special education class</p> <p><b>3. School Community</b> 3a) rural 3b) village/town 3c) small city 3d) urban</p>	<p>Code if mention of grade level or division; code comments about class setting whether a regular class or special education class; code reference to school setting or community – such as location of school in a rural setting or city neighbourhood.</p> <p>Exclude comments about resource withdrawal support, or alterations to school day for student(s).</p>

<p><b>Conceptualizations and Perceptions (P)</b></p> <p><b>CONCPT</b></p> <p>(relates to <i>DSE/DS</i> theoretical models of disability and Bourdieu's concept of <i>habitus</i> (dispositions that generate perceptions and practices, the way of seeing things by agents (individuals, groups, institutions); links to the explanatory potential of one's habitus )</p>	<p>1. Conceptualization of IDD</p> <p>2. Characteristics of IDD</p> <p>3. Perception of Special Educational Need (SEN)</p> <p>4. Types of Special Educational Needs</p>	<p><b>1. Conceptualization of IDD</b></p> <p>1 a) disability due to conditions within learner (medical model)</p> <p>1 b) disability due to difficulties within the social environment (social model)</p> <p>1 c) disability due to both (1 a) and (1 b) (social relational model)</p> <p><b>2. Characteristics of IDD</b></p> <p>2a) biological traits</p> <p>2b) behavioural</p> <p>2c) cognitive</p> <p>2d) adaptive/life skills</p> <p>2e) communication</p> <p>2f) social/emotional</p> <p><b>3. Perception of special educational need</b></p> <p>3a) strengths-based</p> <p>3b) deficit-based</p> <p>3c) support based</p> <p>3d) environment based</p> <p>3e) instructional</p> <p><b>4. Types of SEN</b></p> <p>4a) Cognitive</p> <p>4b) Academic</p> <p>4c) Behaviour</p> <p>4d) Social/Emotional</p> <p>4e) Life Skills</p> <p>4f) Learning</p> <p>4g) Support services</p> <p>4h) Adaptations / Accommodations</p>	<p>Applies to text describing participant's view of disability and IDD, beliefs and explanations about causes and reasons for student's difficulties; includes notions and perspectives held by the participant.</p> <p>Applies to comments about specific traits or characteristics of the student that participant associates with IDD. Includes comments about family background or factors participant believes relates to students with IDD. Does not apply to comments about other conditions such as student has asthma, hearing loss unless the statement appears linked to participant's view of IDD.</p> <p>Code applies to text that mentions beliefs and views about the meaning of special needs in education; text that conveys the participant's reasons for and/or understandings about the special needs of students and how classified.</p> <p>Code applies to comments about problem areas or difficulties presented by the student that are seen as special educational needs. Does not include comments about needs of family or home issues unless participant associates these as special needs for school programming, such as needs related to dressing, toileting, use of technology.</p>
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<p><b>Student Knowledge &amp; Information (P and E)</b></p> <p><b>STDKN</b></p> <p>(relates to <i>disability models</i> and perceptions of students; links to Bourdieu's concepts of <i>habitus</i> of the agent as the dispositions, perceptions, beliefs held; from past and present experiences that shape practices and affect organizing structures; relates to logic of practice informed by field conditions, field mechanisms)</p>	<p>1. Information Source 2. Assessment Data 3. Sense of Preparedness</p>	<p><b>1. Information Source</b> 1a) previous teacher(s) 1b) administration 1c) Resource teacher(s) 1d) EA(s) 1e) Parent/Guardian 1f) other family 1g) other professionals 1h) previous IEP(s) 1i) OSR reports &amp; documentation (e.g. report cards)</p> <p><b>2. Assessment Data</b> 2a) diagnostic reports 2b) formal testing 2c) classroom assessments</p> <p><b>3. Sense of Preparedness</b> 3a) very prepared &amp; knowledgeable 3b) somewhat prepared &amp; knowledgeable 3c) not prepared or knowledgeable</p>	<p>Code relates to specific sources of knowledge and information about the student used to develop the IEP; includes reference to relevant information about the student from other people, from available student documentation, and student assessment data.</p> <p>Applies to comments about informal assessments within the classroom such as, "I keep a portfolio of the student's work and then I look it over to see what's been done and where they need to go."</p> <p>Applies to specific text that indicates participant's sense of knowledge and preparedness for teaching students with IDD and developing the IEP for the student with IDD.</p> <p>Does not include information about conditions or circumstances unrelated to the student's learning such as information about the family, home, or personal information about other people in child's life.</p>
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<p><b>Collaborative Practice/Involvement of Others (P)</b></p> <p><b>COLLAB</b></p> <p>(links to Bourdieu's field theory: field mechanisms as the way of doing things or operation of the field; field conditions as interests, underlying motives, and reasons for individual's choices or decisions that constitute their actions; other processes occurring in the field to shape the phenomena of IEP development; how teacher's response to student constructed in the field)</p>	<p>1. Interprofessional Collaboration 2. Parent/Family Collaboration 3. Student Collaboration</p>	<p><b>1. Interprofessional</b> 1a) other classroom teachers 1b) school administration 1c) Resource Teacher(s) 1d) EA(s) 1e) school board support staff 1f) agency/therapists 1g) other professional</p> <p><b>2. Parent/Family Collaboration</b> 2a) Parent/Guardian 2b) other family</p> <p><b>3. Student Collaboration</b></p>	<p>This code relates to specific collaboration with others who are familiar with the student(s) or working with the student(s) when developing the IEP. Applies to any efforts and steps taken to gather input from others with knowledge about the student for making decisions about the IEP and its content such as for goal setting, services and supports. Includes mention of involving the student in the IEP development process.</p> <p>Must be mention of involving others in developing the IEP in some way such as, "I send the IEP home for the parents to look at and I ask them for any suggestions." "I sit down with the student and we go over the learning goals in the IEP."</p>
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<p><b>IEP Practice (P)</b></p> <p><b>IEPPRAC</b></p> <p>(relates to Bourdieu's positions of agents (teachers) in the field, positions of legitimate authority in the IEP process; logic of practice as to what is doable and thinkable in the field, the ruling principles, discourses used; the accounts of teachers that tell about their position in the field and underlying logic of practice re: actions, practices, rationales, roles.</p>	<p>1.Action</p> <p>2.Role/Responsibility</p>	<p><b>1.Action</b></p> <p>1a) procedure 1b) explanation 1c) decision making</p> <p><b>2.Role/Responsibility</b></p> <p>2a) teacher role 2b) school team role 2c) resource teacher role 2d) school administration role 2e) parent role 2f) role of other</p>	<p>Code units of text that describe how decisions are made for developing the IEP. Code text that describes the teacher's role or the roles and responsibilities assigned to others where there is comment about a combination of roles such as teacher and Resource Teacher</p>
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<p><b>IEP Content (P)</b></p> <p><b>IEPCONT</b></p> <p>(relates to Bourdieu's concept of <i>capital</i> – forms of capital, and <i>social reproduction</i>)</p>	<p>1. Instructional Priority</p> <p>2. Individualized Curricula</p> <p>3. Response to Student</p> <p>4. Services/Supports</p>	<p><b>1.Instructional Priority</b></p> <p>1a) academic learning 1b) functional skills     i.life skills     ii.personal care     iii.social skills     iv.communication     vi.literacy     vii.numeracy     viii.technology     ix. other</p> <p>1c) physical/motor 1d) behaviour skills 1e) vocational skills 1f) transition skills 1g) other skills</p> <p><b>2.Individualized Curricula</b></p> <p>2a) Ontario Curriculum     i.grade-level     ii.modified 2b) Alternative Curriculum 2c) Both 2a &amp; 2b</p> <p><b>3.Response to Student</b></p> <p>3a) remediation of deficits 3b) strengths focus 3c) interests focus 3d) combination (a, b, c)</p>	<p>This code corresponds to the concentration of individualized program. Code text where mention is made of the program focus area, priorities for programming described by participant, and comments about specific skill areas addressed in the curricular content of the IEP.</p> <p>Code text that refers to any curricular source used for choosing IEP goals and expectations such as goals based on the provincial curriculum, based on an alternative program, or a combination of goals and expectations based on both. If Ontario curriculum is used, code for whether expectations are stated as being at grade level or are modified expectations.</p> <p>Code applies to statements describing the response to the student such as intervention or remediating deficits, statements about building student's strengths, or IEP goals focused on student interests: (3a) "He doesn't have</p>
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		<p><b>4.Services &amp; Supports</b>  4a) instructional aid  4b) environmental  4c) human support  4d) technology</p>	<p>any skills in reading so I focus on these most of the time”.</p> <p>(3b) “She is good at using her iPad so we spend a lot of time building these skills.”</p> <p>(3c) “He knows a lot about trains so I include this in his IEP expectations.”</p> <p>Code mention of any specialized supports and services such as use of an Ipad, computer, sound-field system; includes mention of specialized support from an EA, therapist. Do not code mention of general supports provided in the classroom that are part of daily teaching such as “I like to use the Smartboard” or “Sometimes the Resource Teacher comes in and helps out.”</p>
<p><b>IEP Management</b>  <b>IEPMAN</b>  (link to Bourdieu’s <i>field mechanisms</i> and <i>conditions</i>; regulation and monitoring)</p>	<p>1.Practice  2.Role / Responsibility</p>	<p>1.Practice  1a) teacher action  1b) school-based action  1c) school board action</p> <p>2.Role / Responsibility  2a) teacher responsibility  2b) other staffrole</p>	<p>This code corresponds to identifying practices and actions for managing the IEP document, maintaining and storing copies of the IEP, use of computer database, provision of copies to stakeholders (parents, other teachers working with student)</p>

<p style="text-align: center;"><b>School Culture</b></p> <p style="text-align: center;"><b>SCHCULT</b></p> <p>(links to Bourdieu’s concepts of habitus, and field, field conditions and interests underlying reasons and motives; concepts of power, authority and regulation of practice)</p>	<p>1. Collective Beliefs</p> <p>2. Professional Community</p>	<p><b>1. Collective Beliefs</b></p> <p>1a) IEP process</p> <p>1b) students with disabilities</p> <p>1c) inclusive education</p> <p>1d) separate education</p> <p><b>2. Professional Community</b></p> <p>2a) school leadership</p> <p>2b) school board leadership</p> <p>2c) school collegiality</p>	<p>Code corresponds to text that describes the general beliefs and attitudes held within the school regarding the IEP process, the importance attached to the IEP by staff, and general comments about school culture in terms of serving and supporting students with disabilities i.e. “Everyone in this school is really supportive of the student.” “We have a very inclusive attitude about students in this school.” “A lot of the teachers still think of these kids as ‘those students’ in that class.” Apply to comments about school leadership and/or school board leadership regarding the IEP process, leadership for professional learning about the IEP, coordination of efforts by school administration related to the IEP process, and inferences or remarks about collegiality within school such as comments about a culture of support in IEP development.</p>
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<p style="text-align: center;"><b>Teacher Disposition</b></p> <p style="text-align: center;"><b>TCHDISP</b></p> <p>(links to Bourdieu’s concepts of habitus - individual beliefs, dispositions, feelings, narratives as constituted by one’s habitus; field conditions as the interests that frame the teacher’s social actions in developing IEPs; capital – the outcomes valued that influence priorities of teacher for IEP development and content)</p>	<p>1. Underlying Perspective</p> <p>2. Sense of Accountability</p>	<p><b>1. Underlying Perspective</b></p> <p>1a) compassion /empathy</p> <p>1b) protection (due to vulnerability)</p> <p>1c) charity (helping, caring for others)</p> <p>1d) rights of child</p> <p>1e) normalization of child</p> <p>1f) independence</p> <p><b>2. Sense of Accountability</b></p> <p>2a) teacher ownership</p> <p>2b) school system/ school ownership</p>	<p>This code applies to mention of a particular value perspective held in discussing the individualization of the school program for the student(s) such as: “It’s their right to have a program that is based on what they need.” “We have to take care of these kids and do what we can to help them”. “We must make sure these students are as independent as possible.”</p> <p>Includes general comments or statements about participant’s personal sense of responsibility and ownership expressed in the learning of the student(s) and developing and implementing the IEP as</p>
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			<p>well as comments about the school and/or school system's accountability for the student.</p> <p>Does not include text describing duties or specific responsibilities in teaching students.</p>
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<p><b>IEP Benefits (E)</b></p> <p><b>IEPBEN</b></p> <p>(links to Bourdieu's notions of social reproduction, logic of practice, field theory and mechanisms as ways of doing things in the site/classroom)</p> <p><b>PARK</b></p> <p><b>PK</b></p>	<p>1.Student Benefits</p> <p>2.Teacher Benefits</p> <p>3.Parent/Family Benefits</p> <p>4.Other</p> <p>5.Limited/No Benefits</p>	<p><b>1.Student Benefits</b></p> <p>1a) learning achievement</p> <p>1b) supports/services</p> <p>1c) behaviour</p> <p>1d) transitions</p> <p>1e) other</p> <p><b>2.Issues</b></p> <p>2a) school-based</p> <p>2b) school board- based</p> <p>2c) family based</p> <p>2d) IEP process</p> <p>2e) documentation</p> <p>2f) topical</p> <p>2g) other</p>	<p>Code applies to comments about the benefits and positive aspects of the IEP, its importance, descriptions of how the IEP helps in the teaching and learning of the student.</p> <p>Issues described are coded for how the participant view an issue such as whether it is seen as a school-based issue, a school board issue, a general issue related to the IEP process or to issues with IEP documentation itself. Code as topical if comment is made about a broad issue or topic that has relevancy to the IEP.</p> <p>Applies to text that no other code is relevant, to text that is unclear in meaning, or text to be considered later.</p>
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## Appendix K

### Individual Participant Summary Form: Illustrative Example

**Participant** (Pseudonym): Hannah    **Interview Date:** December 11, 2013

**School Board:** A-DSB\_ /B-DSB \_/C-DSB     **Classroom:** Grade 7/8

#### Summary of Responses:

##### *Research Question 1: Conceptualization of IDD and special educational needs*

- unable to articulate how IDD conceptualized
- framed response around needing to know where the student was in terms of level of functioning and beginning from there
- talked of special educational needs as within the student, stating it was the student's specific needs that were the source of issues; needs conceptualized in terms of how the student was able to function within the classroom
- needs were child-focused, understood as what is necessary to be successful
- normalizing narrative used by frequent references to student's abnormal, deviant behaviour and difficulties; accounts repeatedly reflected the establishment of limitations of student's behaviour and inabilities (Brantlinger 2006, Ashton, 2011)
- description of needs in relationship to norms achieved by peers in classroom

##### *Research Question 2: Influence of disability models and exceptionality classifications*

- did not express that the category of IDD exceptionality influenced how she saw the student or educational needs however frequent inferences made to characteristics of people with IDD and the deficiencies associated with IDD
- one narrative segment tells of how the student's disability was likely inherited and that he "had a syndrome" similar to a relative
- specific characteristics were described in terms of communication, social skills and behavioural deficits in the student that were problematic and therefore constituted much of the IEP's focus

##### *Research Question 3: Student information sources*

- accounts of relying on information in the OSR
- previous IEP and report cards
- previous classroom teacher and school resource teacher

- educational assistants' input, mother, therapists (OT/PT)
- formal assessment reports on cognitive functioning
- school board support staff – Speech/Language

*Research Question 4: Explanation of individualized education program*

- interpretative narrative expressed about student's needs and functional skills as the determinants for the program
- alternative learning goals and expectations formed basis of IEP
- content focused on behaviour, self-control, social skills with peers, communication, use of personal technology (IPad) community functioning
- narrative expressed clear attention to student's deficits and overcoming deficiencies to best extent possible so student could be "somewhat successful"

*Research Question 5: Influence of educational documents*

- did not indicate that documents from Ministry of Education or school board impacted on IEP development or how student's needs and exceptionality were viewed
- at same time clearly narrated the perspective reflected in documents that special needs are linked to skill deficits, lagging areas of learning and knowledge acquisition that put the student at risk and must be addressed
- expressed the view that educational documents likely provide guidance to the resource teachers who in turn provide direction and assistance to classroom teachers therefore there may be some indirect influence on how the IEP is developed

**Summary of interview data according to themes and sub-themes**

*Theme: Teacher Personal Factors*

- a) teaching qualifications – B.Ed.; Special Education Part 1
- b) teaching experience – nine years in a regular classroom; is teacher-in-charge when principal is away
- c) classroom context – small rural school in village setting, regular classroom, split grade 7/8, 29 students; full time EA support
- d) related experience - none

*Theme: Teacher self-efficacy and sense of preparedness*

- a) knowledge of students with IDD

not very knowledgeable; indicated until student was in the classroom, knowledge of IDD was limited; no PD related to IDD; information on IDD mainly from agency support people and mother

- b) knowledge of IEP process
  - primarily through informal learning with colleagues
  - “Special Education Part 1 didn’t prepare me at all. “It was more of a sink or swim” (H1:14)
- c) sense of personal skill level for developing IEP
  - at first by trial and error, not very prepared; now “I’m comfortable doing the IEPs. But I wish the program didn’t change all the time so we didn’t have to learn new programs” (H1: 29-31)
- d) professional learning and training
  - “I would work with the Resource Teacher” (H1:41)
  - “We haven’t had any school board training...There’s not any release time to learn about it – it’s strictly on your own” (H1:48-51)

*Theme: Conceptualizations and Representations*

- a) Disability/IDD
  - “It’s important to find out where the student is...and to start from where they need to be and work towards a goal” (H1: 59-61)
- b) Special Educational Needs
  - “needs are what’s necessary for the student to be successful – the specific needs of the student in the classroom” (H1:131-133)

*Theme: IEP development*

- a) Student knowledge sources:
  - OSR information; parent, EAs, resource teacher, therapists
  - school team meeting records
  - previous teachers in school
  - psychological assessments and other formal assessments
  - “my textbooks” (H1:144)
- b) Procedures and strategies:
  - i. gathering information
    - “I find out the baseline level of student’s performance level and develop IEP goals from there” (H1: 99)
    - look at OSR, get input from others - mother, EA, therapists
  - ii. decision making
    - an IEP goal identified is “a specific action goal that you’re going to do. I like it a lot better. It’s goal specific and action oriented” (H1: 35-37)
  - iii. implementation
    - EA works on most of the goals inside and outside of the classroom

- iv. monitoring and revision  
we monitor the student's behaviour and "if the goal is causing too many behaviours or the student is over-whelmed" then the goals and expectations are changed (H1:106-7); EA does most of assessing and monitoring of progress (anecdotal notes and checklists kept)

*Theme: IEP curricular content*

- a) Program focus:
  - i. Ontario curriculum grade level
  - ii. modified curriculum
  - iii. alternative program  
the Ontario curriculum doesn't come into the IEP design "because he is functioning around a 12 month level" (H1: 184)  
"Absolutely an alternative program and alternative report card"  
...The IEP is attached to the Provincial Report Card" (H1:194)
- b) Functional skills:
  - "I start from where the student needs to be" (H1: 60)
  - "We're working on communication skills, learning to have a voice and control over his world" (H1: 148)
  - "I need him to be able to communicate some of his basic needs" (H1: 160-161)
- c) Accommodations and supports:
  - uses an iPad; special chair and desk area for behaviour management

*Theme: Collaboration and involvement of others*

- a) school-based personnel - Resource Teacher, EA  
"a lot of open communication between the EAs is really important because they are a lot more hands on with him than I am" (H1:72)
- b) parent/family - "Mom tries to have a strong input on the IEP but these are school-based goals and while I always run them past her, she tries to have more input than she is to" (H1:83)  
"I send the consultation forms home" (H1:324); a communication log sent between home and school that the EAs do daily
- c) student not involved
- d) community agency/inter-professional collaboration - "A physio comes in but I'm not sure from where to help with his chair and with anything I think I need" (H1:23). "There's an OT, that's how we got the iPad" (H1: 68)
- e) school board personnel - "A Speech Language Pathologist from the school board comes in" (H1:17)

*Theme: Teacher satisfaction*

- a) Challenges and impediments:

- time constraints - “There’s not enough time to get to know the student in the fall before the first IEP is due by the end of September (H1:78); timing with the fall Progress Report – Progress Report does not include reference to the IEP as for other report cards
  - format of IEP – keeps changing – “the rules have changed” – “we are told not to modify expectations unless extenuating circumstances”; expectations “should be
  - grade level ones” (H1: 306-311); the format is too long; having to access the IEP electronically all the time;
  - disagreement about IEP goals - “Mother’s input is often unrealistic” (H1: 99) not agreeing with what other teachers have put on the IEP
  - level of support – “being on my own to develop the IEP without support from special education staff” (H1: 29-31); “There’s no release time from the school board to learn about the IEP” (H1: 51)
  - goal setting – “learning how long it takes to reach a goal. The biggest thing, the difficulty I had was figuring out where he was and where his specific needs were so that we could best accommodate them” (H1: 64-66)
- b) Benefits:
- i. teacher  
the IEP lists curriculum expectations and not specific goals or “specific things the student was going to do as before. I like it a lot better. It’s a lot easier for me to modify...it makes report cards a lot easier” (H1:31)  
“It’s a lot easier to slide in what they’re doing with the rest of the class. It’s a lot more inclusive” (H1: 284-285)
  - ii. parent/family  
“It’s a lot easier for parents to understand what they [students] are doing” (H1:35)
- c) Usefulness to daily instruction:  
somewhat helpful - “He has specific IEP goals that direct what they [EAs] try to do each day” (H1: 264)

*Theme: School Culture*

- a) leadership  
“I was uncomfortable being told what to put on the IEP by the principal and resource teacher initially when I first came to the school because I didn’t know the student well enough” (H1: 75-77)
- b) collegial support -  
“This year I was completely on my own in the creation of the IEP without any support from special ed” (H1: 44-45)

*Additional Comments:*

frustrated that the principal signs the IEP when it’s the teacher that develops it. “Even though I write the IEP, this gets pulled out of my hands” (H1: 290-296)

## Appendix L

### Document Review Form: Illustrative Example

<p><b>Name of Document and Date:</b> Special Education Report 2013-2014</p>	
<p><b>Authorship:</b> B-DSB</p>	
<p><b>Document Context and Policy Environment:</b>          Report created in response to the Ontario Ministry of Education's Standards for School Boards' Special Education Plans, 2000; in compliance with the Canadian Charter of Rights and Freedoms, the Ontario Human Rights Code, the Ontario Education Act, and the Accessibility for Ontarians with Disabilities Act.</p> <p><b>Intended Audience:</b>          School Board and public</p> <p><b>Purpose of Document:</b>  <input checked="" type="checkbox"/> Informative / Descriptive  <input type="checkbox"/> Resource / Guideline  <input type="checkbox"/> Policy / Legislative</p>	
<p><b>Summary of Content</b></p>	<p><b>Page #</b></p>
<p><b>Underlying Ideology and Major Premises:</b></p> <ul style="list-style-type: none"> <li>- approaches to special education and its delivery directed at creating inclusive learning environments and maximizing student outcomes</li> <li>- all students have different abilities that require different resources; it is the responsibility of the board to help "exceptional pupils to reach their academic, physical, social and emotional potential"</li> <li>- special education and actions focus on the individual learner</li> <li>- special education is a shared responsibility in partnership with parents, students, school board personnel, community members</li> <li>- programs must be developed based on the student's <i>strengths and needs</i></li> <li>- successful instruction based on evidence-based research, experience, differentiated instruction and universal design</li> <li>- exceptional students are able to have their needs met in regular classrooms</li> <li>- staff development's goal includes developing more "awareness of the needs of students with exceptionalities"</li> </ul>	<p>4-5, 7</p>

<p><b><i>Explanatory Message(s):</i></b></p> <ul style="list-style-type: none"> <li>- the complexity of students’ needs continue to increase requiring careful planning; students’ needs “may change” from year to year</li> <li>- societal and legislative demands lead to increased special education programs and services (the social and authoritative voice underlying special education)</li> <li>- the provision of programs and services is based on student needs</li> <li>- the school is responsible for ensuring parents/guardians are involved</li> <li>- identified strengths and needs of the student determine the most enabling educational setting</li> <li>- the IEP is developed by the classroom teacher in consultation with the school team and parents/guardians</li> <li>- the IEP is created to describe the appropriate accommodations and/or program modifications for the student based on continuous assessment</li> <li>- developing a plan is a staged process with the classroom teacher having the prime responsibility for assessing and interpreting the student’s performance</li> <li>- the IEP identifies curriculum areas to be accommodated or modified</li> <li>- the teacher works in cooperation with the school team, parents/guardians, colleagues in the school and the school board in providing for students</li> <li>- the principal is responsible for establishing a school team that is accountable and addresses concerns about a student</li> </ul>	<p>5, 7</p> <p>4- 5</p> <p>7</p> <p>8</p> <p>10</p>
<p><b>Key Words / Phrases/ Expressions</b></p>	<p><b>Page #</b></p>
<p>“all students can succeed”</p> <p>“the special needs of learners”</p> <p>students have their “own unique patterns of learning”</p> <p>“students with special education needs”</p> <p>“the learning and productivity needs” of students</p> <p>“fairness is not sameness”</p> <p>“classroom teachers are the “key educators”</p> <p>the school is responsible for ensuring parental involvement</p> <p>“the most enabling education setting”</p> <p>“the needs of the student”</p> <p>“the needs of these students”</p>	<p>5</p> <p>7</p> <p>10</p> <p>12</p> <p>18</p>

<p>“an IEP is a written plan”</p> <p>“the IEP “is a working document”</p> <p>“the IEP is “a tool to help teachers”</p> <p>“the IEP is “a flexible, working document”</p> <p>“the IEP is “an ongoing record”</p> <p>“the IEP is “a plan”</p> <p>“the IEP describes the special education program “to meet that student’s needs”</p> <p>“the IEP is based on the “thorough assessment of the student’s strengths, interests, and needs”</p> <p>transition planning is “an integral part”</p> <p>staff development focuses on building awareness of “the needs of students with exceptionalities”</p> <p><b>Major Themes</b></p> <ol style="list-style-type: none"> <li>1. Context of document (type, audience, voice, argument)</li> <li>2. Representations of students (conceptualizations, understandings, beliefs)</li> <li>3. Effective practices in IEP development (actions taken, decision making, IEP management)</li> <li>4. Individualization of programs (focus of IEP content: curricular, supports, accommodations, instructional, student knowledge sources)</li> <li>5. Teacher efficacy (role, responsibility, knowledge and skills)</li> <li>6. Collaboration and partnerships</li> <li>7. School culture (support and resources)</li> </ol>	
<p><b>Commonalities in Document Narrative to B-DSB Teachers’ Narratives</b></p> <ul style="list-style-type: none"> <li>- alternative curriculum is the basis of the school program for students for whom the Ontario curriculum is not appropriate</li> <li>- functional literacy/ numeracy and life skills constitute much of the alternative program addressed in the IEP</li> <li>- teachers prepare students for as much independence as possible</li> <li>- use of differentiated instruction is important</li> <li>- support of school team, resource teachers, and colleagues is valuable</li> <li>- parents and the student when possible, are invited to participate in discussions about the IEP</li> <li>- the principal provides important support and leadership for facilitating</li> </ul>	



<p>effective practices, providing resources and professional learning opportunities about the IEP process</p>	
<p><b>Relating Document Findings to Conceptual Framework for Study</b></p> <p><i>Theoretical perspectives:</i>          Logic of practice within the field (school system)          Field rules, regulations, and structures at work          Nature of valued capital (special education focus and program content)          Source of underlying beliefs, conceptualizations, premises (habitus)          Model of disability - view of exceptionality and special educational needs</p> <p><i>Research Literature:</i>          Perspectives of disability          Meaning associated with special educational needs          IEP processes          -issues of collaboration          -IEP development          -IEP content and decision making</p>	
<p><b>Ambiguities / Contradictions / Issues to Consider About Document</b></p> <ul style="list-style-type: none"> <li>- states responsibility for each student's education is shared by stakeholders including the student and that parents and students are key partners in discussing the special education program yet subsequently states it is the school team, parents, relevant agencies that coordinate the planning, delivery, and evaluation of the program for the student as per the student's IEP with no mention of the student being involved</li> <li>- students are placed in regular classrooms when the placement meets the student's needs with no mention of meeting the strengths of the student</li> <li>- states the classroom teacher has the primary responsibility for developing the program for the student in consultation with the school team, then states it is the School Team that develops, implements, and reviews the IEP in conjunction with others</li> </ul>	<p>4 – 5</p> <p>7</p> <p>7, 8,</p> <p>18</p>

Source: Adapted from Miles & Huberman (1994, pp. 54-55).

## Appendix M

### Illustrative Example of Participants' Descriptions and IEP Focus

Key: R = regular classroom teacher; S = special education classroom; IDD = Intellectual Developmental Disability; SENs = special educational needs

Participant	Interview Excerpt	View -IDD	View- SENs	IEP Focus
Nancy – R Gr. 1- 2	“It’s all about the student...all of us have areas of need.” “It’s an equal playing field in my room.” (N1: 19-21, 61) “for this particular student he may be where he’s going to need special goals set for him.” (68-71) “I look at what his needs are because he struggles with fine motor and gross motor.” (91-92)	everyone is different with their own strengths and needs	everyone has areas of need; needs as special goals set for the student; special needs as areas of struggle	Ontario curriculum modified
Rachel – R Gr. 4	“The big picture was I knew that his brain worked really differently. That’s kind of how I thought about it...that he has specific needs that are significant. So significantly below his age level ...just his level of functioning is significantly below. Just cognitively, how he’s able to process or takes in information is significantly low...there is an intellectual disability, a communication disability” (R1:160-174)	cognitive functioning significantly below age level; as deficient in specific areas of functioning such as intellectual and communication skill areas	special needs as needs that are significant compared to age level	combined alternative and modified Ontario curriculum
Sarah – R Gr. 7	“They’re all different. But I think of lagging social skills, maybe that lacking of awareness of self and others. I think of learning some basic needs skills, basic life skills. And just maybe lagging on the skills we traditionally put value on in a public school setting, lagging in what the board and what are education	lagging behind in traditional areas of skill development	special needs as basic skills, social skills, life skills, skills for success within the classroom	Ontario Curriculum grade level

Cathy – S	<p>system has placed value on...I'm so ingrained not to judge...the kid before the label...you just think not traditionally successful in what we would expect.” (S1: 70 - 72)</p> <p>“They are just learning differently...several grades below their same age peers...it doesn't mean that they can't do similar tasks, it's just that they need it in a very different way or simplified or much more practice...that IDD means we need to sort of scale it back and get to the basics...it's such a broad range” (C1: 75-88)</p>	below normal levels of functioning; deficits and difference in learning; involves a broad range of meanings	special needs due to differences in learning; needs as meaning different instruction and tasks	alternative program
Drew – S	<p>“When I hear special education needs now, I think of the kids in my class...They're all on alternative programs, so when I think of that now I think of communication and socializing because those are the two big things with my guys.” (DR1:139)</p>	specific areas of skill development are deficient	special needs as areas of difference to be overcome	alternative program – social and behaviour, life skills, communication
Barb - S	<p>“You can't fit someone into a box...I don't know if I necessarily give that much thought to the meaning of IDD. I know how the student learns, at what rate...and I know what I can expect.” (B1: 144-157) “I look at the curriculum and what is also life-based.” “a lot is just coping strategies” (267)</p>	people with IDD vary; can't be categorized based on definition; the person first	special needs as person-centered; specific skill areas to be developed; life-based skills; areas of deficit to be addressed	alternative program and modified Ontario curriculum

## Curriculum Vitae

**Name:** **Karen P. Gregory**

**Post-secondary  
Education and  
Degrees:** The University of Western Ontario  
London, Ontario, Canada  
Doctor of Philosophy (Educational Studies), 2015

The University of Western Ontario  
London, Ontario, Canada  
Masters of Education, 1984

University of Toronto  
Toronto, Ontario, Canada  
Bachelor of Education, 1975

Trent University  
Peterborough, Ontario, Canada  
Bachelor of Arts, 1973

**Honours and  
Awards:** Social Science and Humanities Research Council (SSHRC)  
Doctoral Fellowship  
2012-2014

Province of Ontario Graduate Scholarship  
Doctoral Studies  
2011-2012

W.A. Townshend Gold Medal Award for Excellence in Graduate  
Studies Faculty of Education,  
The University of Western Ontario  
1984

**Related Work  
Experience** Graduate Teaching Assistant  
The University of Western Ontario  
Faculty of Education  
2012-2014

Research Assistant  
The University of Western Ontario  
Faculty of Education  
2010-2013

Autism Project Lead  
 Southwestern Ontario Region  
 Special Education Branch, Ministry of Education  
 Government of Ontario  
 2009-2010

Learning Coordinator - Special Education  
 Thames Valley District School Board  
 London, Ontario  
 1998-2010

Lecturer, Continuing Education Studies  
 The University of Western Ontario  
 Faculty of Education  
 2000-2004

Consultant – Primary/Junior Curriculum and Special Education  
 The Board of Education for the City of London  
 London, Ontario  
 1996-1998

Resource Teacher  
 Board of Education for the City of London  
 London, Ontario  
 1991-1996

Itinerant Teacher: Hearing Impaired  
 Board of Education for the City of London  
 London, Ontario  
 1987-1988

Classroom Teacher  
 Board of Education for the City of London  
 London, Ontario  
 1980 -1987, 1988 -1991

Classroom Teacher / Itinerant Resource Teacher  
 The Robarts School, Provincial Schools Branch  
 London, Ontario  
 1976-1980

**Publications:  
 Articles in Journals**

Ng, S., Fernandez, V., Buckrell, B., & Gregory K. (2010).  
 Report on a school board's interprofessional approach to  
 managing the provision of hearing assistance technology for

students with auditory processing disorders. *Journal of Educational Audiology*, 16, 73-85.

King, G., McDougall, J., Tucker, M., Gritzan, J., Malloy-Miller, T., Alambets, P. Cuning, D., & **Gregory, K.** (1999). An evaluation of functional school-based therapy services for children with special needs. *Physical and Occupational Therapy in Pediatrics: The Quarterly Journal of Developmental Therapy*, 19(2), 5-29.

**Professional Presentations:**

**Gregory, K.** (May 2014). *Individual Education Plans (IEPs) and elementary students with developmental disabilities in Ontario's public schools: A narrative inquiry*. Paper Presentation at the *Canadian Society for the Study of Education (CSSE) Annual Conference*. Brock University, St. Catharines, ON., May 28, 2014.

**Gregory, K.** (May 2012). *Constructing Students' Identities in the Individual Education Plan Development Process: Doctoral Research Proposal*. Paper Presentation at the *Canadian Society for the Study of Education Annual Conference*. Laurier University/University of Waterloo, Waterloo, ON., May 2012.

**Gregory, K.** (2012). *Making sense of classroom assessment for students with intellectual developmental disabilities*. Annual Conference of the Ontario Association of Developmental Education, Brampton, ON., April, 2012.

**Gregory, K.** (2011). *Assessing literacy skills in students with developmental disabilities*. Annual Conference of the Ontario Council for Exceptional Children, Toronto, ON., December 4, 2011.

**Gregory, K.** (2011). *Reconceptualizing classroom assessment practices for students with developmental disabilities*. Ontario Association of Developmental Education, London, ON., April, 2011.

**Gregory, K., P. & Salazar, R.** (1985). *A Classroom Total Communication Program for Children with Autism*. The Annual Convention of the American Speech and Hearing Association, Washington, D.C., November, 1985.

**Gregory, K.** (1984). *Classroom programming for children with autism: A total communication approach*. Annual Conference of the Ontario Council for Exceptional Children, Niagara Falls, ON., October, 1984.

**Invited Talks:**

**Gregory, K.** (2015). The IEP and Music in Inclusive Education. Presentation, Summer Session, Talbot College, Western University, London, ON.

**Gregory, K., DeDecker, C., Ng, S., & Dolmage, C.** (2012). *Understanding students with exceptionalities*. Presentation, Social Justice and Equity Day, Faculty of Education, University of Western Ontario, London, January 27, 2012.

**Gregory, K.** (2011). *Justifying teachers' decisions in the Individual Education Plan (IEP) development process*. Centre for Inclusive Education Research Seminar, Faculty of Education, University of Western Ontario, London, February, 2011.

**Gregory, K. & DeDecker, C.** (2010). *Meeting the Needs of students with Autism Spectrum Disorders in the Classroom*. Presentation, Developmental Service Program, Fanshawe College, London, ON., March, 2010.

**Gregory, K.** (2009). *Connections for Students: Collaborative Services Delivery Model for Supporting the Transitions of Students with Autism Spectrum Disorder*. Presentation, Special Education Advisory Committee, Thames Valley District School Board, London, ON.

**Gregory, K.** (2009). *Ministry of Education Document "Shared Solutions": Implications for Schools and Community Partners in Preventing and Resolving Conflicts in Special Education*. Presentation, Thames Valley Children's Centre, London, ON.

**Gregory, K. & Norton, P.** (2008). *Creating Meaningful Literacy Opportunities for Students with Developmental Disabilities: Daily Instructional Strategies within a Balanced Literacy Framework*. Council of Ontario Directors of Education Special Education Project, London, ON., April, 2008.

**Gregory, K.** (2005). *Staying on the Island: Reading and Writing Intervention for Students with Learning Disabilities*. Presentation, Thames Valley District School Board, London, ON., October, 2005.

**Gregory, K.** (2004). *Language Learning Disabilities: Implications for Literacy Skills Acquisition*. Presented at the Professional Development Day for Teachers, Thames Valley District School Board, London, ON., October, 2004.

**Gregory, K.** (2003). *Making the Connections: Teaching Reading and Writing to Students with Developmental Challenges*. Presentation, Thames Valley District School Board, London, ON., October, 2003.

Corcoran, V. & **Gregory, K.** (2003). *Students with special needs in the public school system*. Presentation, School of Nursing, Western University, London, ON.

**Gregory, K.** (2000). *Assessment Issues and Strategies for Students in Special Education*. Presentation, Faculty of Education, Western University, London, ON.

**Gregory, K.** (1999). *Components of a Balanced Literacy Program: Oral Language, Reading, and Writing Strategies for Students At Risk*. Summer Sessions for Teachers: Early Years and Primary Grades, Thames Valley District School Board, London, ON., August, 1999.

**Gregory, K.** (1987). *Programming for Students with Communication Disorders*. Council for Exceptional Children: Ontario Division of Communication Disorders, Queen's Park, Toronto, ON.

#### **Professional Activities:**

- Reviewer, CSSE Conference (2015)
- Moderator, Discussant (2013-2014), Annual Research in Education Symposium, Faculty of Education, Western University
- Organizing Committee Member (2011-2013), Annual Research in Education Symposium, Faculty of Education, Western University
- Thames Valley District School Board Task Force on Inclusion (2006-2008), London
- Early Childhood Education Advisory Committee, Fanshawe College (1996-2000), London, ON



- Marker, EQAO Provincial Testing Grade Six Reading and Writing (1999-2000)
- Mathematics Workshop Leader, Addison-Wesley Publishers (1997-1998), Toronto
- Thames Valley Children Centre Task Force on Services for School-age Clients (1996-1997), London, ON
- Chair, Annual Conference of the Ontario Association of Teachers of the Developmentally Disabled (1986), London, ON

**Professional Certifications:**

- Certified Teacher (Ontario) – Primary, Junior, Intermediate
- Certified Specialist in Special Education (Ontario)
- Certified Specialist Teacher of the Deaf and Preschool Deaf Specialist (Ontario)
- Principal's Qualifications Part 1 (Ontario)

**Additional Professional Courses/Certificates:**

- 2009 Geneva Centre Summer Training Institute: School-based Intervention Strategies for Students with Autism Spectrum Disorder, London, ON
- 2008 Geneva Centre Summer Training Institute: Program Planning for Students with Autism, London, ON
- 2007 Geneva Centre Summer Training Institute: Applied Behaviour Analysis in the Education of Students with Autism Spectrum Disorder, Toronto, ON
- 2005 University of North Carolina Summer Training Institute: Teaching and Education of Children with Communication Handicaps (TEACCH)
- 2000 American Speech and Hearing Association Summer Institute: Literacy Programs for Children with Oral and Written Language Impairments, Las Vegas, Nevada 1994