EDUCATION WHITE PAPER 6

DEPARTMENT OF EDUCATION

Special Needs Education
Building an inclusive education and training system.

31 May 2001

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INTRODUCTION BY THE MINISTER OF EDUCATION

When I announced the Implementation Plan for Tirisano, I noted with regret that our national and system-wide response to the challenge of Special Education would be delayed but brought to the public as soon as we had analysed the comment on the Consultative Paper (Department of Education. *Consultative Paper No. 1 on Special Education: Building an Inclusive Education and Training System*. August 30, 1999). I am therefore glad to announce our response in this White Paper.

I am especially pleased that I have had the opportunity to take personal ownership of a process so critical to our education and training system which begun some five years ago in October 1996 with the appointment of the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services. I say this because I am deeply aware of the concerns shared by many parents, teachers, lecturers, specialists and learners about the future of special schools and specialised settings in an inclusive education and training system. They share these concerns because they worry about what kind of educational experience would be available to learners with moderate to severe disabilities in mainstream education. I understand these concerns, especially now, after I have observed what a difference special schools can make when they provide a quality and relevant learning experience.

In this White Paper, we make it clear that special schools will be strengthened rather than abolished. Following the completion of our audit of special schools, we will develop investment plans to improve the quality of education across all of them. Learners with severe disabilities will be accommodated in these vastly improved special schools, as part of an inclusive system. In this regard, the process of identifying, assessing and enrolling learners in special schools will be overhauled and replaced by structures that acknowledge the central role played by teachers, lecturers and parents. Given the considerable expertise and resources that are invested in special schools, we must also make these available to neighbourhood schools, especially full-service schools and colleges. As we outline in this White Paper, this can be achieved by making special schools, in an incremental manner, part of district support services where they can become a resource for all our schools.

I am also deeply aware of the anxieties that many teachers, lecturers, parents and learners hold about our inclusion proposals for learners with special education needs. They fear the many challenges that may come with inclusion - of teaching, communication, costs, stereotyping and the safety of learners - that can be righted only by further professional and physical resources development, information dissemination and advocacy. We address these concerns also in this White Paper.

Beginning with thirty and expanding up to 500 schools and colleges, we will incrementally develop full-service school and college models of inclusion that can in the long term be considered for system-wide application. In this manner the Government is demonstrating its determination that through the development of models of inclusion we can take the first steps of implementing our policy goal of inclusion.

This White Paper, together with Education White Paper 5 on Early Childhood Development completes an extraordinary period of seven years of post-apartheid policy development and policy making outlined in Education White Paper 1 on Education and Training that began in the final quarter of 1994. It is a policy paper that took us more time to complete than any of the five macro-systems policies that it follows upon. This means that is has benefited the most from our early experience and knowledge of the complex interface of policy and practice.

It is therefore another post-apartheid landmark policy paper that cuts our ties with the past and recognises the vital contribution that our people with disabilities are making and must continue to do, but as part of, not isolated from the flowering of our nation.

I hold out great hope that through the measures that we put forward in this White Paper we will also be able to convince the thousands of mothers and fathers of some 280,000 disabled children - who are younger than 18 years and are not in schools or colleges - that the place of these children is not one of isolation in dark backrooms and sheds. It is with their peers, in schools, on the playgrounds, on the streets and in places of worship where they can become part of the local community and cultural life, and part of the reconstruction and development of our country. For, it is only when these ones among us are a natural and ordinary part of us that we can truly lay claim to the status of cherishing all our children equally.

Race and exclusion were the decadent and immoral factors that determined the place of our innocent and vulnerable children. Through this White Paper, the Government is determined to create special needs education as a non-racial and integrated component of our education system.

I wish to take this opportunity to invite all our social partners, members of the public and interested organisations to join us in this important and vital task that faces us: of building an inclusive education system. Let us work together to nurture our people with disabilities so that they also experience the full excitement and the joy of learning, and to provide them, and our nation, with a solid foundation for lifelong learning and development. I acknowledge that building an inclusive education and training system will not be easy. What will be required of us all is persistence, commitment, co-ordination, support, monitoring, evaluation, follow-up and leadership.

Professor Kader Asmal, MP
Minister of Education

EXECUTIVE SUMMARY

1. In this White Paper we outline what an inclusive education and training system is, and how we intend to build it. It provides the framework for establishing such an education and training system, details a funding strategy, and lists the key steps to be taken in establishing an inclusive education and training system for South Africa.

2. In October 1996, the Ministry of Education appointed the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services to investigate and make recommendations on all aspects of 'special needs and support services' in education and training in South Africa.

3. A joint report on the findings of these two bodies was presented to the Minister of Education in November 1997, and the final report was published by the Department of Education in February 1998 for public comment and advice (Report of National Commission on Special Needs in Education and Training and National Committee on Education Support, Department of Education, 1997).

4. The central findings of the investigations included: (i) specialised education and support has predominantly been provided for a small percentage of learners with disabilities within 'special' schools and classes; (ii) where provided, specialised education and support was provided on a racial basis, with the best human, physical and material resources reserved for whites; (iii) most learners with disability have either fallen outside of the system or been 'mainstreamed by default; (iv) the curriculum and education system as a whole have generally failed to respond to the diverse needs of the learner population, resulting in massive numbers of drop-outs, push-outs, and failures; and, (v) while some attention has been given to the schooling phase with regard to 'special needs and support', the other levels or bands of education have been seriously neglected.

5. In the light of these findings, the joint report of the two bodies recommended that the education and training system should promote education for all and foster the development of inclusive and supportive centres of learning that enable all learners to participate actively in the education process so that they can develop and extend their potential and participate as equal members of society.

6. The principles guiding the broad strategies to achieve this vision included: acceptance of principles and values contained in the Constitution and White Papers on Education and Training; human rights and social justice for all learners; participation and social integration; equal access to a single, inclusive education system; access to the curriculum, equity and redress; community responsiveness; and cost-effectiveness.

7. The report also suggested that the key strategies required to achieve this vision included: (i) transforming all aspects of the education system, (ii) developing an integrated system of education, (iii) infusing 'special needs and support services'

throughout the system, (iv) pursuing the holistic development of centres of learning to ensure a barrier-free physical environment and a supportive and inclusive psycho-social learning environment, developing a flexible curriculum to ensure access to all learners, (v) promoting the rights and responsibilities of parents, teachers and learners, (vi) providing effective development programmes for educators, support personnel, and other relevant human resources, (vii) fostering holistic and integrated support provision through inter-sectoral collaboration, (viii) developing a community-based support system which includes a preventative and developmental approach to support and, (ix) developing funding strategies that ensure redress for historically disadvantaged communities and institutions, sustainability, and – ultimately – access to education for all learners.

8. Based on the recommendations in the joint report, the Ministry released a Consultative Paper (Department of Education. *Consultative Paper No. 1 on Special Education: Building an Inclusive Education and Training System*. August 30, 1999). The submissions and feedback of social partners and the wider public were collated and have informed the writing of this White Paper.

9. In this White Paper, we outline the Ministry of Education's commitment to the provision of educational opportunities in particular for those learners who experience or have experienced barriers to learning and development or who have dropped out of learning because of the inability of the education and training system to accommodate their learning needs. We recognise that our vision of an inclusive education and training system can only be developed over the long term and that the actions we will take in the short to medium term must provide us with models for later system-wide application. Our short to medium term actions will also provide further clarity on the capital, material and human resource development, and consequently the funding requirements of building an inclusive education and training system.

10. We also define inclusive education and training as:

    ❑   Acknowledging that all children and youth can learn and that all children and youth need support.
    ❑   Enabling education structures, systems and learning methodologies to meet the needs of all learners.
    ❑   Acknowledging and respecting differences in learners, whether due to age, gender, ethnicity, language, class, disability, HIV or other infectious diseases.
    ❑   Broader than formal schooling and acknowledging that learning also occurs in the home and community, and within formal and informal settings and structures.
    ❑   Changing attitudes, behaviour, teaching methods, curricula and environment to meet the needs of all learners; and

❑ Maximising the participation of all learners in the culture and the curriculum of educational institutions and uncovering and minimising barriers to learning.

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

12. Different learning needs may also arise because of:

❑ Negative attitudes to and stereotyping of difference.
❑ An inflexible curriculum.
❑ Inappropriate languages or language of learning and teaching.
❑ Inappropriate communication.
❑ Inaccessible and unsafe built environments.
❑ Inappropriate and inadequate support services.
❑ Inadequate policies and legislation.
❑ The non-recognition and non-involvement of parents, and
❑ Inadequately and inappropriately trained education managers and educators.

13. In accepting this inclusive approach we acknowledge that the learners who are most vulnerable to barriers to learning and exclusion in South Africa are those who have historically been termed 'learners with special education needs,' i.e. learners with disabilities and impairments. Their increased vulnerability has arisen largely because of the historical nature and extent of the educational support provided.

14. Accordingly, the White Paper outlines the following as key strategies and levers for establishing our inclusive education and training system:

❑ The qualitative improvement of special schools for the learners that they serve and their phased conversion to resource centres that provide professional support to neighbourhood schools and are integrated into district-based support teams.
❑ The overhauling of the process of identifying, assessing and enrolling learners in special schools, and its replacement by one that acknowledges the central role played by teachers, lecturers and parents.
❑ The mobilisation of out of school disabled children and youth of school going age.
❑ Within mainstream schooling, the designation and phased conversion of approximately 500 out of 20,000 primary schools to full service schools, beginning with the thirty school districts that are part of the national district development programme. Similarly, within adult basic, further and higher education, the designation and establishment of full service educational institutions. These full

service education institutions will enable us to develop models for later system-wide application.

- ❑ Within mainstream education, the general orientation and introduction of management, governing bodies and professional staff to the inclusion model, and the targeting of early identification of the range of diverse learning needs and intervention in the Foundation Phase.

- ❑ The establishment of district-based support teams to provide a co-ordinated professional support service that draws on expertise in further and higher education and local communities, targeting special schools and specialised settings, designated full service and other primary schools and educational institutions, beginning with the thirty districts that are part of the national district development programme; and

- ❑ The launching of a national advocacy and information programme in support of the inclusion model focusing on the roles, responsibilities and rights of all learning institutions, parents and local communities and highlighting the focal programmes and reporting on their progress.

15. The development of an inclusive education and training system will take into account the incidence and the impact of the spread of the HIV/AIDS pandemic and other infectious diseases. For planning purposes the Ministry of Education will ascertain, in particular, the consequences for the curriculum, the expected enrolment and drop-out rates and the funding implications for both the short- and long-term. The Ministry will gather this information from an internally commissioned study as well as from other research being conducted in this area.

CHAPTER 1

WHAT IS AN INCLUSIVE EDUCATION AND TRAINING SYSTEM?

1. **Context**

Special needs education is a sector where the ravages of apartheid remain most evident. The segregation of learners on the basis of race was here extended to incorporate segregation on the basis of disability. Apartheid special schools were thus organised according to two segregating criteria, race and disability. In accordance with apartheid policy, schools that accommodated white disabled learners were extremely well-resourced whilst the few schools for black disabled learners were systematically under-resourced.

Learners with disability experienced great difficulty in gaining access to education. Very few special schools existed and they were limited to admitting learners according to rigidly applied categories. Learners who experienced learning difficulties because of severe poverty did not qualify for educational support. The categorisation system allowed only those learners with organic, medical disabilities access to support programmes.

The impact of this policy was that only 20% of learners with disabilities were accommodated in special schools. The World Health Organisation has calculated that between 2.2 per cent and 2.6 per cent of learners in any school system could be identified as disabled or impaired. An application of these percentages to the South African school population would project an upper limit of about 400,000 disabled or impaired learners. Current statistics show that only about 64,200 learners with disabilities or impairments are accommodated in about 380 special schools. This indicates that, potentially, 280,000 learners with disabilities or impairments are unaccounted for.

The results of decades of segregation and systematic under-resourcing are apparent in the imbalance between special schools that catered exclusively for white disabled learners and those that catered exclusively for black disabled learners. It is therefore imperative that the continuing inequities in the special schools sector are eradicated and that the process through which the learner, teacher and professional support services populations become representative of the South African population is accelerated.

In this White Paper we outline how the policy will:

❑ Systematically move away from using segregation according to categories of disabilities as an organising principle for institutions;

❑ Base the provision of education for learners with disabilities on the intensity of support needed to overcome the debilitating impact of those disabilities.

❑ Place an emphasis on supporting learners through full service schools that will have a bias towards particular disabilities depending on need and support;

❑ Direct how the initial facilities will be set up and how the additional resources required would be accessed;

❑ Indicate how learners with disability would be identified, assesses and incorporated into special, full service and ordinary schools in an incremental manner;

❑ Introduce strategies and interventions that will assist teachers to cope with a diversity of learning and teaching needs to ensure that transitory learning difficulties are ameliorated;

❑ Give direction for the Education Support System needed; and

❑ Provide clear signals about how current special schools will serve identified disabled learners on site and also serve as a resource to teachers and schools in the area.

The National Disability Strategy condemns the segregation of persons with disabilities from the mainstream of society. It emphasises the need for including persons with disabilities in the workplace, social environment, political sphere, and sports arenas. The Ministry supports this direction and sees the establishment of an inclusive education and training system as a cornerstone of an integrated and caring society and an education and training system for the 21st Century.

1.1 Introduction

1.1.1 Our Constitution (Act 108 of 1996) founded our democratic state and common citizenship on the values of human dignity, the achievement of equality and the advancement of human rights and freedoms (Section 1 (a)). These values summon all of us to take up the responsibility and challenge of building a humane and caring society not for the few but for all South Africans. In establishing an education and training system for the 21st Century, we carry a special responsibility to implement these values and to ensure that all learners, with and without disabilities, pursue their learning potential to the fullest.

1.1.2 In building our education and training system, our Constitution provides a special challenge to us by requiring that we give effect to the fundamental right to basic education for all South Africans. In Section 29 (1), it commits us to this fundamental right, viz., "that everyone has the right to a basic education, including adult basic education …"

1.1.3 This fundamental right to basic education is further developed in the Constitution in Section 9 (2), which commits the state to the achievement of equality, and Sections

9 (3), (4) and (5), which commits the state to non-discrimination. These clauses are particularly important for protecting all learners, whether disabled or not.

1.1.4 The Government's obligation to provide basic education to all learners and its commitment to the central principles of the Constitution are also guided by the recognition that a new unified education and training system must be based on equity, on redressing past imbalances and on a progressive raising of the quality of education and training.

1.1.5 In line with its responsibility to develop policy to guide the transformation programme that is necessary to achieve these goals, the Ministry of Education has prepared this White Paper for the information of all our social partners and the wider public. This policy framework outlines the Ministry's commitment to the provision of educational opportunities in particular for those learners who experience or have experienced barriers to learning and development or who have dropped out of learning because of the inability of the education and training system to accommodate the diversity of learning needs and those learners who continue to be excluded from it.

1.1.6 The White Paper outlines how the education and training system must transform itself to contribute to establishing a caring and humane society, how it must change to accommodate the full range of learning needs and the mechanisms that should be put in place.

1.1.7 Particular attention shall be paid to achieving these objectives through a realistic and effective implementation process that moves responsibly towards the development of a system that accommodates and respects diversity. This process will require a phasing in of strategies that are directed at departmental, institutional, instructional and curriculum transformation. It will also require the vigorous participation of our social partners and our communities so that social exclusion and negative stereotyping can be eliminated.

1.2   The White Paper process

1.2.1 This White Paper arises out of the need for changes to be made to the provision of education and training so that it is responsive and sensitive to the diverse range of learning needs. Education White Paper No. 1 on Education and Training (1995) acknowledged the importance of providing an effective response to the unsatisfactory educational experiences of learners with special educational needs, including those within the mainstream whose educational needs were inadequately accommodated.

1.2.2 In order to address this concern within its commitment to an integrated and comprehensive approach to all areas of education, the Ministry appointed a National Commission on Special Needs in Education and Training and a National Committee on Education Support Services in October 1996. A joint report on the

findings of these two bodies was presented to the Minister in November 1997, and the final report was published in February 1998. The Ministry released a Consultative Paper (Department of Education. Consultative Paper No. 1 on Special Education: Building an Inclusive Education and Training System. August 30, 1999) based to a large extent on the recommendations made to the Minister in this report.

1.2.3 The Consultative Paper advocates inclusion based on the principle that learning disabilities arise from the education system rather than the learner. Notwithstanding this approach, it made use of terms such as "learners with special education needs" and "learners with mild to severe learning difficulties" that are part of the language of the approach that sees learning disabilities as arising from within the learner. There should be consistency between the inclusive approach that is embraced, viz., that barriers to learning exist primarily within the learning system, and the language in use in our policy papers. Accordingly, the White Paper adopts the use of the terminology "barriers to learning and development". It will retain the internationally acceptable terms of "disability" and "impairments" when referring specifically to those learners whose barriers to learning and development are rooted in organic / medical causes.

1.2.4 A detailed report on the Department's response to submissions generated by the Consultative Paper can be found in Annexure A.

1.3 The current profile and distribution of special schools and learner enrolment

1.3.1 Based on data from our Education Management Information System (EMIS)(Department of Education, Pretoria), the following is the distribution of special schools, learner enrolment and individual learner expenditure across all provincial departments of education.

Provinces	No of Special Schools	No of Learners In Special Schools	% of learners in Special Schools	% of total no of special schools in province	Per learner Expenditure
Eastern Cape	41	6 483	0.28%	10.79%	13 746
Free State	19	3 127	0.40%	5.00%	22 627
Gauteng	96	25 451	1.62%	25.26%	11 049
KwaZulu Natal	58	7 631	0.28%	15.26%	21 254
Mpumalanga	15	2 692	0.29%	3.95%	17 839
Northern Cape	8	1 392	0.68%	2.11%	15 749
Northern	19	4 250	0.23%	5.00%	16 609
North West	42	4 364	0.46%	11.05%	13 015
Western Cape	82	9 213	0.96%	21.58%	28 635
Totals	**380**	**64 603**	**0.52%**	**100.00%**	**17 838**

1.3.2 From national census data on disabled persons we can further see the extent of disparities in the provision of education for learners with disabilities.

Census data: Distribution of disabled persons per category per province.

Prov.	Sight	Hearing	Physical	Mental	Multiple	Not specified	Total	% per prov.	% of population
EC	161898	68531	115717	41432	35997	38604	462179	17.39	1.14
FS	133614	33045	41960	13947	16461	18127	257154	9.68	0.63
Gaut.	211769	59868	69936	24033	26030	63906	455542	17.14	1.12
KZN	183758	76034	129894	42646	24895	44863	502090	18.89	1.24
MP	98322	31895	41381	12211	9019	19085	211913	7.97	0.52
NC	18529	6083	9052	3791	2403	7137	46995	1.77	0.12
NP	113088	51416	60078	22578	16019	33690	296869	11.17	0.73
NW	129442	37571	54706	17768	16913	23134	279534	10.52	0.69
WC	40603	18965	35051	14146	6499	30174	145438	5.47	0.36
TOT.	1091023	383408	557775	192552	154236	278720	2657714	100.0	6.55
% per disability	41.05	14.43	20.99	7.25	5.80	10.49	100.00		
% per population	2.69	0.94	1.37	0.47	0.38	0.69	6.55		

1.3.3. Analysis of the data reveals the extent of the disparities in provision for learners with disabilities, for example:

❑ The incidence of disabilities in the Eastern Cape constitutes 17.39% of the disabled population yet the province has only 10.79% of the total number of special schools.

❑ Gauteng has 17.14% of the disabled population but has 25.26% of the schools.

❑ The Western Cape has 5.47% of the disabled population but has 21.58% of the schools.

1.3.4 This mismatch between needs and provision is a direct result of previous apartheid policies that allocated facilities on a racial basis. These policies also centralised provision within the Western Cape and Gauteng so that the vast majority of learners today attend residential special schools in a province other than their own since no facilities were available in their province of residence.

1.3.5 A comparison between the overall incidence of disabilities and the number of learners accommodated in school also reveals stark disparities, for example:

❑ 0.28% of learners in the Eastern Cape are enrolled in special schools yet the overall incidence figure for the population of disabled persons (of all ages) is 17.39%.
❑ This pattern is repeated across provinces indicating that significant numbers of learners who – based on the traditional model - should be receiving educational support in special schools are not getting any.
❑ While the national total incidence figure for disabilities (of all ages) is 6.55%, the total numbers of learners in special schools is 0.52%.

1.3.6 The data also demonstrates that learner expenditure on learners with disabilities also varies significantly across provinces, ranging from R11,049, in Gauteng to R28,635 in the Western Cape and R22,627 in the Free State. While this distribution of learner expenditure demonstrates inefficiency in the use of resources, it also demonstrates the absence of a uniform resourcing strategy and national provisioning norms for learners with disabilities.

1.3.7 In an inclusive education and training system, a wider spread of educational support services will be created in line with what learners with disabilities require. This means that learners who require low-intensive support would receive this in ordinary schools and those requiring moderate support would receive this in full service schools. Learners who require high-intensive educational support would continue to receive such support in special schools.

Estimating the number of disabled learners who are out of school.

Population selected:	Total	Using WHO min. of 2.2%	Using WHO max. of 2.6%
A: Total population age 7-15 using Census '96 shows learners in compulsory age	8,291,000	182,000	216,000
B: Total population age 6-15 using Census '96 shows inclusion of Grade R	9,225,000	203,000	240,000
C: Total school population age 6-18 using Census '96	11,734,000	258,000	305,000
D: Total population in public + indepen-dent ordinary + special schools, 1999, DoE figures	12,378,000	272,000	322,000
E: D + Grade R cohort from B	13,312,000	293,000	346,000

1.3.8 Based on the calculations in the table above and taking into account the number of learners who are currently accommodated in special schools, 64,603, our estimate of a reasonable expectation, before adjustments for growth, of disabled learners who are out of school is 260,000. Our estimate of the upper limit of out of school disabled learners is 280,000.

1.4 What is inclusive education and training?

1.4.1 In this White Paper inclusive education and training:

❑ Is about acknowledging that all children and youth can learn and that all children and youth need support.
❑ Is accepting and respecting the fact that all learners are different in some way and have different learning needs which are equally valued and an ordinary part of our human experience.
❑ Is about enabling education structures, systems and learning methodologies to meet the needs of all learners.
❑ Acknowledges and respects differences in learners, whether due to age, gender, ethnicity, language, class, disability or HIV status.
❑ Is broader than formal schooling and acknowledges that learning also occurs in the home and community, and within formal and informal modes and structures.
❑ Is about changing attitudes, behaviour, teaching methodologies, curricula and the environment to meet the needs of all learners.
❑ Is about maximising the participation of all learners in the culture and the curricula of educational institutions and uncovering and minimising barriers to learning; and,
❑ Is about empowering learners by developing their individual strengths and enabling them to participate critically in the process of learning.

1.4.2 It is clear that some learners may require more intensive and specialised forms of support to be able to develop to their full potential. An inclusive education and training system is organised so that it can provide various levels and kinds of support to learners and educators.

1.4.3 Believing in and supporting a policy of inclusive education is not enough to ensure that such a system will work in practice. Accordingly, we will evaluate carefully what resources we already have within the system and how these existing resources and capacities can be strengthened and transformed so that they contribute to the building of an inclusive system. We will also decide on where the immediate priorities lie and put in place mechanisms to address these first.

1.4.4 In this White Paper we also distinguish between mainstreaming and inclusion as we describe below:

"Mainstreaming" or "Integration"	"Inclusion"
Mainstreaming is about getting a learner to 'fit in' to a particular kind of system or integrating them into this existing system.	Inclusion is about recognising and respecting the differences among all learners and building on the similarities.
Mainstreaming is about giving some learners extra support so that they can 'fit in' or be integrated into the 'normal' classroom routine. Learners are assessed by specialists who diagnose and prescribe technical interventions such as the placement of learners in programmes.	Inclusion is about supporting all learners, educators and the system as a whole so that the full range of learning needs can be met. The focus is on teaching and learning factors, and places emphasis on the development of good teaching strategies that would be of benefit to all learners.
Mainstreaming and integration focus on changes that need to take place in the learner so that they can 'fit in." Here the focus is on the learner.	Inclusion focuses on overcoming barriers in the system that prevent it from meeting the full range of learning needs. The focus is on the adaptation of and support systems available in the classroom.

1.5   Building an inclusive education and training system. The first steps.

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

❑   Negative attitudes to and stereotyping of difference.
❑   An inflexible curriculum.
❑   Inappropriate languages or language of learning and teaching.
❑   Inappropriate communication.
❑   Inaccessible and unsafe built environments.
❑   Inappropriate and inadequate support services.
❑   Inadequate policies and legislation.
❑   The non-recognition and non-involvement of parents, and

❑ Inadequately and inappropriately trained education managers and educators.

In accepting this approach it is essential to acknowledge that the learners who are most vulnerable to barriers to learning and exclusion in South Africa are those who have historically been termed 'learners with special education needs' i.e. learners with disabilities and impairments. Their increased vulnerability has arisen largely because of the historical nature and extent of the educational support provided.

1.5.2 As will be obvious from a reading of the factors contributing to the diverse range of learning needs, it is possible to identify barriers to learning operative within the learner or the education and training system. These may also arise during the learning process and be temporary, and can be addressed through a variety of mechanisms and processes. Interventions or strategies at different levels such as the classroom, the school, the district, the provincial and national departments and systems will be essential to prevent them from causing learning to be ineffective. Interventions or strategies will also be essential to avoid barriers to learning from contributing to the exclusion of learners from the curriculum and/or from the education and training system.

Human resources development for classroom teachers

Classroom teachers will be our primary resource for achieving our goals of an inclusive education and training system. This means that teachers will need to improve their skills and knowledge, and develop new ones. Staff development at the school and district level will be critical to putting in place successful integrated educational practices. Ongoing assessment of teachers' needs through our developmental appraisal followed by structured programmes to meet these needs will make a critical contribution to inclusion.

1. In mainstream education, priorities will include multi-level classroom instruction so that teachers can prepare main lessons with variations that are responsive to individual learner needs; co-operative learning; curriculum enrichment; and, dealing with learners with behavioural problems.

2. In special schools/resource centres, priorities will include orientation to new roles within district support services of support to neighbourhood schools, and new approaches that focus on problem solving and the development of learners' strengths and competencies rather than focussing on their shortcomings only.

3. In full-service schools, priorities will include orientation to and training in new roles focusing on multi-level classroom instruction, co-operative learning, problem solving and the development of learners' strengths and competencies rather than focussing on their shortcomings only.

4. Education support personnel within district support services will be oriented to and trained in their new roles of providing support to all teachers and other educators. Training will focus on supporting all learners, educators and the system as a whole so that the full range of learning needs can be met. The focus will be on teaching and learning factors, and emphasis will be placed on the development of good teaching strategies that would be of benefit to all learners; on overcoming barriers in the system that prevent it from meeting the full range of learning needs; and on adaptation of and support systems available in the classroom.

5. Management and governance development programmes will be revised to incorporate orientation to and training in the management and governance implications of each of the categories of institutions within the inclusive education and training system, viz., special, full-service and mainstream. Training will focus on how to identify and address barriers to learning.

1.5.3 This approach to addressing barriers to learning and exclusion is consistent with a learner-centred approach to teaching and learning. It recognises that developing learners' strengths and empowering and enabling them to participate actively and critically in the learning process involves identifying and overcoming the causes of learning difficulties. The approach is also consistent with a systemic and developmental approach to understanding problems and planning action. It is consistent with new international approaches that focus on providing quality education for all learners.

What are curriculum and institutional barriers to learning and how do we remove these?
One of the most significant barriers to learning for learners in special and 'ordinary' schools is the curriculum. In this case barriers to learning arise from different aspects of the curriculum such as:
❑ The content (i.e. what is taught).
❑ The language or medium of instruction.
❑ How the classroom or lecture is organised and managed.
❑ The methods and processes used in teaching.
❑ The pace of teaching and the time available to complete the curriculum.
❑ The learning materials and equipment that is used, and
❑ How learning is assessed.

What can be done to overcome these barriers and who will assist institutions to do this?

The most important way of addressing barriers arising from the curriculum is to make sure that the process of teaching and learning is flexible enough to accommodate different learning needs and styles. The curriculum must therefore be made more flexible across all bands of education so that it is accessible to all learners, irrespective of their learning needs. One of the tasks of the district support team will be to assist educators in institutions in creating greater flexibility in their teaching methods and in the assessment of learning. They will also provide illustrative learning programmes, learning support materials and assessment instruments.

1.5.4 Embracing this approach as the basis for establishing an inclusive education and training system does not mean that we should then proceed to declare it as policy and hope that its implementation will proceed smoothly within all provincial systems and all education and training institutions. Rather, the successful implementation of this policy will rely on a substantive understanding of the real experiences and capabilities of our provincial systems and education and training institutions, the setting of achievable policy objectives and priorities over time and regular reporting on these. Successful policy implementation will also rely on the identification of key levers for policy change and innovation within our provincial systems and our education and training institutions.

1.5.5 It is this approach that lies at the heart of this White Paper: a determination to establish an inclusive education and training system as our response to the call to action to establish a caring and humane society, and a recognition that within an education and training system that is engaging in multiple and simultaneous policy change under conditions of severe resource constraints, we must determine policy

priorities, identify key levers for change and put in place successful South African models of inclusion.

1.5.6 Against this background, we identify within this White Paper the following six key strategies and levers for establishing our inclusive education and training system:

1.5.6.1 The qualitative improvement of special schools and settings for the learners that they serve and their conversion to resource centres that are integrated into district-based support teams.

The place and role of special schools in an inclusive education system.

As we described earlier, special schools currently provide, in a racially segregated manner, education services of varying quality.

1. While special schools provide critical education services to learners who require intense levels of support they also accommodate learners who require much less support and should ideally be in mainstream schools.

2. When implementing our policy on inclusion we will pay particular attention to raising the overall quality of education services that special schools provide.

3. We will also ensure that learners who require intense levels of support receive these services since mainstream schools will be unable to provide them.

4. In addition to these roles, special schools will have a very important role to play in an inclusive system. The new roles for these schools would include providing particular expertise and support, especially professional support in curriculum, assessment and instruction, as part of the district support team to neighbourhood schools, especially 'full service' schools. This role also includes providing appropriate and quality educational provision for those learners who are already in these settings or who may require accommodation in settings requiring secure care or specialised programmes with high levels of support.

5. Improved quality of special schools will also include the provision of comprehensive education programmes that provide life-skills training and programme-to-work linkages. Here is an example of how a special school can operate a resource centre in their district.

A special school has specialised skills available among its staff and has developed learning materials to specifically assist learners with visual impairments. They may also have facilities for Braille available at the school. The professional staff at this school, as part of their role in the district support team could run a training workshop in their district for other educators on how to provide additional support in the classroom to visually-impaired learners. The special school could produce learning materials in Braille and make them available through a lending system to other schools in the district. The school could also set up a "helpline" for educators or parents to telephone in with queries.

6. But, what will be done to help special schools take on this additional role? The White Paper explains that to assist special schools to function as resource centres in the district support system, there will be a qualitative upgrading of their services.

7. We will focus especially on the training of their staff for their new roles. This process of upgrading will take place once we have completed our audit of the programmes, services and facilities in all 378 special schools and independent special schools.

1.5.6.2   The mobilisation of the approximately 280,000 disabled children and youth outside of the school system.

1.5.6.3   Within mainstream schooling, the designation and conversion of approximately 500 out of 20,000 primary schools to full service schools, beginning with the thirty school districts that are part of the national district development programme. Similarly, within adult basic, further and higher education, the designation and establishment of full service educational institutions. The eventual number of full service institutions (beyond the target of 500) would be governed by our needs and available resources.

What are full- service schools and colleges and how do we intend establishing them?

Full service schools and colleges are schools and colleges that will be equipped and supported to provide for the full range of learning needs among all our learners.

1. It will be impossible in the medium term to covert all 28,000 schools and colleges to provide the full range of learning needs. Notwithstanding this, it will be important to pursue our policy goal of inclusion through the development of models of inclusion that can later be considered for system-wide application.
2. Full service schools and colleges will be assisted to develop their capacity to provide for the full range of learning needs and to address barriers to learning.
3. Special attention will be paid to developing flexibility in teaching practices and styles through training, capacity building and the providing of support to learners and educators in the school.

But, how will this be done?
4. The Ministry, in collaboration with the provincial departments of education will designate and then convert a number of primary schools throughout the country into what are called 'full service' schools.
5. These are schools that will be equipped and supported to provide for a greater range of learning needs.
6. The programmes that are developed in the 'full service' schools will be carefully monitored and evaluated. The lessons learnt from this process will be used to guide the extension of this model to other primary schools as well as other high schools and colleges.

What kind of support will these schools receive?
7. The support they will receive will include physical and material resources as well as professional development for staff.
8. They will also receive special attention from the district support teams so that they can become beacons of our evolving inclusive education system.

Which schools will become 'full service' schools?
9. Initially, we will select at least one primary school in a selection of thirty school districts. Based on lessons learnt from this sample, 500 primary schools will later be selected for conversion into 'full service' schools. When identifying the 500 schools, particular attention will be paid to the mobilisation of community and parent participation so that all social partners and role players can become part of the process of developing these schools.

1.5.6.4   Within mainstream education, the general orientation and introduction of management, governing bodies and professional staff to the inclusion model, and the targeting of early identification of disabilities and intervention in the Foundation Phase.

1.5.6.5   The establishment of district-based support teams to provide a co-ordinated professional support service that draws on expertise in further and higher education and local communities, targeting special schools and specialised settings, designated full service and other primary schools and educational institutions, beginning with thirty school districts.

1.5.6.6   Finally, we will prioritise the implementation of a national advocacy and information programme in support of the inclusion model focusing on the roles, responsibilities and rights of all learning institutions, educators parents and local communities and highlighting the focal programmes and reporting on their progress.

1.6   HIV/AIDS and other infectious diseases

1.6.1   The development of an inclusive education and training system must take into account the incidence and the impact of the spread of the HIV/AIDS and other infectious diseases.

1.6.2   For planning purposes the Ministry will need to ascertain, in particular, the consequences for the curriculum, the expected enrolment and drop-out rates and the funding implications for both the short- and long-terms.

1.6.3   The Ministry will attempt to gather this information from an internally commissioned study as well as from other research being conducted in this area.

In the next chapter we elaborate on these six strategies and levers for change that constitute the core of our policy framework for establishing an inclusive education and training system.

CHAPTER 2

THE FRAMEWORK FOR ESTABLISHING AN INCLUSIVE EDUCATION AND TRAINING SYSTEM

2.1   Introduction

2.1.1   The central objective of this White Paper is to extend the policy foundations, frameworks and programmes of existing policy for all bands of education and training so that our education and training system will recognise and accommodate the diverse range of learning needs.

2.1.2   The most significant conceptual change from current policy is that the development of education and training must be premised on the understanding that:

❑ All children, youth and adults have the potential to learn within all bands of education and they all require support.

❑ Many learners experience barriers to learning or drop out primarily because of the inability of the system to recognise and accommodate the diverse range of learning needs typically through inaccessible physical plants, curricula, assessment, learning materials and instructional methodologies. The approach advocated in this White Paper is fundamentally different from traditional ones that assume that barriers to learning reside primarily within the learner and accordingly, learner support should take the form of specialist, typically medical interventions.

❑ Establishing an inclusive education and training system will require changes to mainstream education so that learners experiencing barriers to learning can be identified early and appropriate support provided. It will also require changes to special schools and specialised settings so that learners who experience mild to moderate disabilities can be adequately accommodated within mainstream education through appropriate support from district-based support teams including special schools and specialised settings. This will require that the quality of provision of special schools and specialised settings be upgraded so that they can provide a high quality service for learners with severe and multiple disabilities.

2.1.3   We are persuaded that the inclusion of learners with disabilities that stem from impaired intellectual development will require curriculum adaptation rather than major structural adjustments or sophisticated equipment. Accordingly, their accommodation within an inclusive education and training framework would be more easily facilitated than the inclusion of those learners who require intensive support through medical interventions, structural adjustments to the built environment and/or assistive devices with minimal curriculum adaptation. Given the serious human resources constraints in the country and the demands for justice, there is an onus on the Government to ensure that all human resources are developed to their fullest potential. In the long run such a policy will lead also to a

reduction in the Government's fiscal burden as the inclusive education and training system increases the number of productive citizens relative to those who are dependant on the state for social security grants.

2.1.4   The central features of the inclusive education and training system put forward in this White Paper are:

❑   Criteria for the revision of existing policies and legislation for all bands of education and training, and frameworks for governance and organisation;
❑   A strengthened district-based education support service;
❑   The expansion of access and provision;
❑   Support for curriculum development and assessment, institutional development and quality improvement and assurance;
❑   A national information, advocacy and mobilisation campaign; and
❑   A revised funding strategy.

2.1.5   It is also essential to acknowledge that many of the barriers to learning that we have drawn attention to in this White Paper are being tackled within many other national and provincial programmes of the Departments of Education, Health, Welfare, and Public Works in particular.

2.1.6   To illustrate, in the case of the Department of Education, the COLTS programme previously, and now the *Tirisano* programme, the District Development Programme, Curriculum 2005, Language in Education Policy, Systemic evaluation (of the attainment of Grade 3 learners), the HIV/AIDS Life Skills Programme and the joint programmes with the Business Trust on school efficiency and quality improvement are examples of programmes that are already seeking to uncover and remove barriers to learning experienced in mainstream education.

2.1.7   The Department of Public Works is implementing a job creation project to provide ramp access for learners on wheelchairs to schools.

2.1.8   The Department of Health is implementing an Integrated Nutrition Strategy including the Primary Schools Nutrition Project to provide learners from poor families with a nutritious meal. The Department also provides free health care for children younger than six years, while the Technical Guidelines on Immunisation in South Africa (1995) provides for children younger than five years to be prioritised for nutritional intervention.

2.1.9   The Department of Social Development prioritises the provision of social development services to children under five years. The Department also provides a child support grant for needy children younger than seven years.

2.1.10 All of these programmes would be enhanced by policies and programmes being advocated in this White Paper.

2.1.11 Accordingly, in this White Paper, the Ministry puts forward a framework for transformation and change which aims to ensure increased and improved access to the education and training system for those learners who experience the most severe forms of learning difficulties and are most vulnerable to exclusion.

2.1.12 This will, of necessity, require that we focus our attention on those learners in special schools and settings and those in remedial or special classes in ordinary schools and settings.

2.1.13 However, while we must focus our efforts on improving the capacity of the education and training system to accommodate learners who experience the various forms of learning difficulties, our focus will require the transformation and change of the entire education and training system for us to be able to accomplish these objectives and to enable mainstream education and training to recognise and address the causes and effects of learning difficulties in 'ordinary' classes and lecture halls.

2.1.14 Transformation and change must therefore focus on the full range of education and training services: the organisations – national and provincial departments of education, further and higher education institutions, schools –(both special and ordinary), education support services, curriculum and assessment, education managers and educators, and parents and communities.

2.2   The framework for establishing an inclusive education and training system.

2.2.1 Education and training policies, legislation, advisory bodies and governance and organisational arrangements

2.2.1.1   In order for the Ministry to establish an inclusive education and training system we shall review all existing policies and legislation for general, further and higher education and training so that these would be consistent with the policy proposals put forward in this White Paper. The South African Schools Act (1996), the Higher Education Act (1997), the Further Education and Training Act (1998), the Adult Basic Education and Training Act (2000) and the accompanying White Papers already provide the basis for the establishment of an inclusive education and training system. Accordingly, the Ministry shall require all advisory bodies to provide it with advice on how to implement the policy proposals contained in this White Paper. The Ministry shall also review the memberships of all advisory bodies to ensure that appropriate expertise and representation enable these bodies to advise the Minister and Members of the Provincial Executive Councils responsible for Education, on goals, priorities and targets for the successful establishment of the inclusive education and training system.

2.2.1.2   In revising policies, legislation and frameworks, the Ministry shall give particular, but not exclusive, attention to those that relate to the school and college systems. Policies, legislation and frameworks for the school and college systems must provide the basis for overcoming the causes and effects of barriers to learning. Specifically, we shall revise admission policies so that learners who can be accommodated outside of special schools and specialised settings can be accommodated within designated full service or other schools and settings. Age grade norms shall be revised to accommodate those learners requiring a departure from these norms as a result of their particular learning needs. Simultaneously the Ministry shall collaborate with the Ministries of Health and Social Development to design and implement early identification, assessment and education programmes for learners with disabilities in the age group 0-9 years. Boarding facilities and transport policies and practices shall be reviewed within the understanding that the neighbourhood or full service school should be promoted as the first choice.

2.2.1.3   In respect of reform schools and schools of industry, the Ministry will collaborate with the Ministry of Social Development and the provincial departments of education to ensure that children and youth awaiting trial in these schools are provided with a supportive and effective learning and teaching environment, and that appropriate assessment practices and clear criteria and guidelines for their placement are established.

2.2.1.4   In higher education institutions access for disabled learners and other learners who experience barriers to learning and development can be achieved through properly co-ordinated learner support services, and the cost-effective provision of such support services can be made possible through regional collaboration. Institutional planning is now a critical part of national planning for higher education, and higher education institutions will be required to plan the provision of programmes for learners with disabilities and impairments through regional collaboration. This is now a requirement of the National Plan for Higher Education.

2.2.1.5   An aspect of the development of learning settings that the Ministry shall give urgent attention to is the creation of barrier-free physical environments. The manner in which the physical environment such as buildings and grounds is developed and organised contributes to the level of independence and equality that learners with disability enjoy. The physical environment of most ordinary schools and learning settings are not barrier-free and even where they may be barrier-free, accessibility has not been planned. Accordingly, space and cost

norms for buildings, including grounds, shall focus on the design and construction of new buildings, as well as the renovation of existing buildings. These actions shall be undertaken in collaboration with the Ministry of Public Works and provincial departments of public works.

2.2.1.6   In beginning to implement the policy proposals put forward in this White Paper, it will be essential to match the capacity of Government with the roles proposed for it. Professional development programmes shall focus on the development of effective leadership in policy, administration and programme implementation, the establishment of management information systems, and the development of competencies necessary for addressing severe learning difficulties within all branches and sections of the national and provincial departments of education.

2.2.1.7   The National Norms and Standards for School Funding will apply to the new Inclusive Education and Training System and its application will be customised to ensure equity and redress.

2.2.2 Strengthening education support services

2.2.2.1   The Ministry believes that the key to reducing barriers to learning within all education and training lies in a strengthened education support service.

2.2.2.2   This strengthened education support service shall have at its centre new district-based support teams that comprise staff from provincial district, regional and head offices and from special schools. The primary function of these district support teams will be to evaluate programmes, diagnose their effectiveness and suggest modifications. Through supporting teaching, learning and management they would build the capacity of schools, early childhood and adult basic education and training centres, colleges and higher education institutions to recognise and address severe learning difficulties and to accommodate a range of learning needs.

2.2.2.3   At the institutional level, in general, further and higher education, we shall require institutions to establish institution-level support teams. The primary function of these teams will be to put in place properly co-ordinated learner and educator support services. These services will support the learning and teaching process by identifying and addressing learner, educator and institutional needs. Where appropriate, these teams should be strengthened by expertise from the local community, district support teams and higher education institutions. District support teams will provide the full range of

education support services such as professional development in curriculum and assessment to these institutional–level support teams.

2.2.2.4   The Ministry shall also investigate how, within the principles of the post provisioning model, designated posts can be created in all district support teams. Staff appointed to these posts can, as members of the district support team, develop and co-ordinate school-based support for all educators.

2.2.2.5   The Ministry recognises that the success of our approach to addressing barriers to learning and the provision of the full range of diverse learning needs lies with our education managers and educator cadre. Accordingly, and in collaboration with our provincial departments of education, the Ministry shall, through the district support teams provide access for educators to appropriate pre-service and in-service education and training and professional support services. The Ministry shall also ensure that the norms and standards for the education and training of teachers, trainers and other development practitioners include competencies in addressing barriers to learning and provide for the development of specialised competencies such as life-skills, counselling and learning support.

2.2.2.6   Special schools and settings shall be converted to resource centres and integrated into district support teams so that that they can provide specialised professional support in curriculum, assessment and instruction to neighbourhood schools. This new role shall be performed by special schools and settings in addition to the services that they provide to their existing learner base. In order to ensure that special schools and settings are well prepared for their new role, we shall conduct an audit of their current capacities and the quality of their provision, raise the quality of their provision, upgrade them to resource centres and train their staff to assume these new roles as part of the district support team.

2.2.2.7   In revising and aligning our education support service, we shall focus our efforts on establishing a co-ordinated education support service along a continuum from national through to provincial departments of education, through to schools, colleges, adult and early childhood learning centres, and higher education, which is sensitive to and accommodates diversity, with appropriate capacities, policies and support services.

2.2.3 Expanding provision and access

2.2.3.1   A central feature of our programme to build an inclusive education and training system is the enrolment of the approximately 280,000

disabled children and youth of compulsory school-going age that are not accommodated in our school system.

2.2.3.2　　　The Ministry will put in place a public education programme to inform and educate parents of these children and youth, and will collaborate with the Department of Social Development to develop a programme to support their special welfare needs, including the provision of devices such as wheel chairs and hearing aids.

2.2.3.3　　　To accommodate these children and youth of school-going age, we shall, in collaboration with the provincial departments of education designate and then convert, as a first step, primary schools to full service schools, beginning in those school districts that form part of the national schools district development programme. We expect eventually to designate and convert to a full service school at least one primary school within each of our school districts taking into account the location of the special schools/resource centres. These full service schools will be provided with the necessary physical and material resources and the staff and professional development that are essential to accommodate the full range of learning needs. In this manner we will expand provision and access to disabled learners within neighbourhood schools alongside their non-disabled peers.

2.2.3.4　　　Together with the provincial departments of education the Ministry will monitor closely the successes and impact of these pilot schools to inform the expansion of the model to other primary and high schools.

2.2.3.5　　　With the collaboration of the provincial departments of education and school governing bodies, full service schools will be made available to adult learners as part of public adult learning programmes.

2.2.4 Further Education and Training

2.2.4.1　　　The Ministry will link the provision of education to learners with disabilities stemming from impaired intellectual development and who do not require intensive support to the general restructuring of the further education and training sector currently being undertaken by the Ministry.

2.2.4.2　　　It is likely that a similar model to that proposed for general education will be developed for the technical colleges, namely that there will be dedicated special colleges which will mirror the full service schools in the general education sector.

2.2.5 Higher Education

2.2.5.1   The National Plan for Higher Education (Ministry of Education, February 2001) commits our higher education institutions to increasing the access of learners with special education needs. The Ministry therefore expects institutions to indicate in their institutional plans the strategies, steps and time-frames they intend taking to increase enrolment of these learners.

2.2.5.2   The Ministry will also make recommendations to higher education institutions regarding minimum levels of provision for learners with special needs. However, all higher education institutions will be required to ensure that there is appropriate physical access for physically disabled learners.

2.2.5.3   It will not be possible to provide relatively expensive equipment and other resources, particularly for blind and deaf students, at all higher education institutions. Such facilities will therefore have to be organised on a regional basis.

2.2.6 Curriculum, assessment and quality assurance

2.2.6.1   Central to the accommodation of diversity in our schools, colleges, and adult and early childhood learning centres and higher education institutions, is a flexible curriculum and assessment policy that is accessible to all learners irrespective of the nature of their learning needs. This is so since curricula create the most significant barrier to learning and exclusion for many learners, whether they are in special schools or settings, or 'ordinary' schools and settings. These barriers to learning arise from within the various interlocking parts of the curriculum, such as the content of learning programmes, the language and medium of teaching and learning, the management and organisation of classrooms, teaching style and pace, time-frames for completion of curricula, the materials and equipment which have been available, and assessment methods and techniques. Barriers to learning and exclusion of this kind also arise from the physical and psycho-social environment within which learning occurs.

2.2.6.2   Accordingly, new curriculum and assessment initiatives will be required to focus on the inclusion of the full range of diverse learning needs. A key responsibility of the district support teams shall be to provide curriculum, assessment and instructional support to public adult learning centres, schools and further education institutions in the form of illustrative learning programmes, learning support materials and assessment instruments.

2.2.6.3   As described earlier, the prevailing situation in special schools and settings and in remedial classes and programmes is inappropriate, and in general fails to provide a cost-effective and comprehensive learning experience for participating learners. In taking the first steps in building an inclusive education and training system, we shall review, improve and expand participation in special schools/resource centres and full service institutions. The Ministry believes that these programmes should provide a comprehensive education, and should provide life skills and programme-to-work linkages. As described earlier, these programmes will also be required to provide their services to neighbourhood schools. Attention shall also be given to those programmes and settings that accommodate learners requiring secure care, specialised programmes and/or high levels of support to ensure that these are provided in an appropriate and cost-effective manner, and that they provide for the psycho-social needs of these learners.

2.2.6.4   Institutional development will therefore focus on assisting educational institutions to recognise and address the diverse range of learning needs among learners. While we provide in this White Paper a framework for educational practices that are consistent with the establishment of an inclusive education and training system, we will focus on and prioritise special schools / resource centres and full service schools and colleges that provide education services to learners most profoundly affected by learning barriers and exclusion.

2.2.6.5   The Ministry fully appreciates the importance of assessment and interventions during the early phases of life. It is during the pre-schooling years that hearing and vision-testing programmes should reveal early organic impairments that are barriers to learning. Community-based clinics are in the best position to conduct an initial assessment and plan a suitable course of action in conjunction with parents and personnel from various social services such as education. In order to ensure the continuity of such services throughout learning, the Ministry recognises that it is essential that links be established between community-based clinics and other service providers and the education and training system. Once learners have entered the formal education system, school-based support teams should be involved centrally in identifying 'at risk' learners and addressing barriers to learning. To achieve this important objective, the Ministry shall work closely with the Ministries of Social Development and Health, and the provincial departments of education. With respect to the school system, early identification of barriers to learning will focus on learners in the Foundation Phase (Grades R-3) who may require support for example through the tailoring of the curriculum, assessment and instruction.

2.2.6.6   Together with the Department of Public Works, we will make a special effort to develop sites of learning that provide physical access to most learners – in terms of buildings and grounds, beginning with designated full service institutions.

2.2.6.7   Materials and equipment, in particular devices such as hearing aids and wheelchairs will be made progressively accessible and available to those learners who cannot gain access to learning because of a lack of appropriate resources. In this respect, our primary focus shall be on the designated full service institutions.

2.2.6.8   Assessment processes will address barriers to learning and current policies and practices will be reviewed and revised to ensure that the needs of all learners are acknowledged and addressed.

2.2.6.9   Existing quality assurance mechanisms at all levels of education and training, and at all sites of learning, will facilitate the development of quality education for all learners including those who are disabled.

2.2.7 Information, advocacy and mobilisation

2.2.7.1   Public awareness and acceptance of inclusion will be essential for the establishment of an inclusive society and the inclusive education and training system put forward in this White Paper. Uncovering negative stereotypes, advocating unconditional acceptance and winning support for the policies put forward in this White Paper will be essential to the establishment of the inclusive education and training system.

2.2.7.2   Accordingly, the Ministry will launch an information and advocacy campaign to communicate the policy proposals contained in this White Paper, including the rights, responsibilities and obligations attached to these. The Ministry will also continue its discussions with national actors and role-players to win their support for the policy of inclusion and to review rights, responsibilities and obligations attached to these. One of the central thrusts of the advocacy campaign will be to target parents since they are regarded as an important form of support.

2.2.7.3   Special attention will be given to the mobilisation of community support for the designation of full service institutions and the conversion of special schools to resource centres.

2.2.7.4   As part of its information, advocacy and mobilisation campaign, and subject to the expansion of provision and access described in this

White Paper, the Ministry will target the recruitment of those learners of compulsory school-going age who are not yet accommodated in our schools. Similarly, the Ministry will target the recruitment of learners to the designated public adult learning centres, and further and higher education institutions as these are established.

2.2.8 HIV/AIDS and other infectious diseases

2.2.8.1   The Ministry will, on an ongoing basis, analyse the effects of HIV/AIDS and other infectious diseases on the education system, and develop and implement appropriate and timely programmes.

2.2.8.2   These programmes would include special measures such as strengthening our information systems, establishing a system to identify orphans, co-ordinate support and care programmes for such learners, put in place referral procedures for teachers, and develop teaching guidelines on how to support orphans and other children in distress.

2.2.8.3   In this regard, the Ministry will work closely with provincial departments of education and the Departments of Social Development, Health and the Public Service Administration.

2.3   Funding Strategy

2.3.1   The funding strategy outlined in this White Paper needs to be adequately resourced to ensure successful implementation.

2.3.2   In Chapter 3 we describe the proposed funding strategy for the policies advocated in this White Paper.

CHAPTER 3

FUNDING STRATEGY

3.1 Introduction

3.1.1 The system of educational provision for learners with special needs inherited from the apartheid era is clearly both inefficient and inequitable. Its inefficiency is reflected first in the maldistribution of students with three provinces (Gauteng, Western Cape and KwaZulu-Natal) having 236 of the 380 special schools (62%) and 65% of learners. Given the centralization during apartheid, learners from all over the country were required to attend schools in these provinces depending on the nature of their needs. However, it is evident that educational provision in the other provinces has also not been cost-effective. For instance, in the North West province 42 schools cater for only just over 4000 students, a learner:school ratio of 104, while in Gauteng the learner:school ratio is approximately 265.

3.1.2 Second, individual learner costs of provision by province vary widely from R11,000 a year in Gauteng to R23,000 in the Free State and R28,600 in the Western Cape. These discrepancies are due largely to the racial organisation of special schools, with schools for Whites most highly resourced. Additionally, these variances probably also reflect other inefficiencies in provision as well.

3.1.3 The system has been historically iniquitous because the focus of provision has been on the white population and remains inadequate for the black population, particularly for Africans in rural areas and small towns. As stated earlier, the segregation of learners on the basis of race was extended to incorporate segregation on the basis of disability. The challenge therefore is to transform the current system to make it more efficient, more equitable and more just.

3.1.4 The policy proposals described in the White Paper are aimed at developing an inclusive education and training system that will ensure that educational provision for learners with special needs is largely integrated over time into what are currently considered 'ordinary schools'.

3.2 Critical success factors

3.2.1 The development of the inclusive education and training system, and in particular, the development of appropriate funding strategies, must take account of various factors that will impact on the nature of, and the extent to which such a system can be developed. Foremost amongst these factors are the human resource, fiscal and institutional capacities.

3.2.2 The high, although improving learner: teacher ratios is putting a considerable burden on all professionals in the education system, both in teaching and management. Expanding access and provision to disabled children and youth of school-going age that are currently out of school implies a steep increase in demands placed on these professionals. Given current financial capacity (see below) as well as the inability of the education system to produce adequate numbers of such individuals in the short term, progress towards the inclusive education and training system will be dependent heavily on more effective usage of current skills in the 'special needs' sector. This is a fundamental proposition of the White Paper.

3.2.3 In the context of the current low growth rate of the South African economy and the relatively large slice of the budget that is allocated to education in nominal terms, it is unlikely that significantly more public resources in real terms will be allocated to the sector in the next few years.

3.2.4 The policies outlined in this White Paper will lead to the more cost-effective usage of resources in the long term when the proposed model is fully operational. In the short-term it is clear, however, that additional funding will be required for "special needs" education – such funding would have to be sought from a range of sources, in particular the provincial education budgets and donor funding, both local and international.

3.2.5 Since provincial governments will have responsibility for the implementation of most of the policies outlined in this White Paper, it will be important to note that provincial governments have only now recovered from considerable over-expenditure of 1997/98 in the social services sector. While over-expenditure during this period in education, in particular on personnel costs and a net increase in pupil enrolment, dramatically reduced expenditure on critical programmes such as special education, early childhood development and adult basic education and training, better financial planning and management have now produced credible budgets and expenditure patterns. The confident but progressive establishment of an inclusive education and training system as outlined in this White Paper must therefore also be understood against this background.

3.2.6 The White Paper recognizes the continued existence of these fiscal realities and capacities and thus proposes a realistic time-frame of twenty years for the attainment of the inclusive education and training system.

3.2.7 It is important however, that the limited financial resources available for the education and training of individuals with barriers to learning are targeted to those with the greatest need. Thus some degree of targeting on the basis of poverty/income/socio-economic status would be required.

3.2.8 A third set of factors critical to the success of the proposed system relates to the development of appropriate institutional structures for delivery. The current system

of provision is both cost-ineffective and excludes individuals with barriers to learning from the mainstream of educational provision. The White Paper proposes a mix of institutional structures of district support systems incorporating special schools as resource centres and full service schools to meet the challenges of provision within an inclusive system. The costs of implementing such a system of institutional structures especially in the transitional phase will need to be investigated.

3.3 Current expenditure patterns

3.3.1 In the fiscal year 2000/01 just less than three per cent (2.82%) of the total education budget or approximately R1.25 billion was allocated to special schools. This figure was slightly down from 1999/2000 (2.85%) and is projected to remain constant for the next two years of the MTEF cycle.

3.3.2 In 2000/01, provincial expenditure on special schools was projected to vary from a low of 1.49% in North West Province to a high of 6.98% in the Western Cape.

3.4 Expanding access and provision

3.4.1 It is estimated that during the apartheid area, only about 20 percent of learners with disabilities were accommodated in special schools. As stated earlier, approximately 280,000 learners are unaccounted for in the system. It is likely that some of them are in mainstream schooling where their needs are not being catered for. However, the majority of them are probably not in the schooling system at all. The mobilization of these out-of-school children and youth represents one of the big challenges in the development of the inclusive education and training system.

3.4.2 Expanding access and provision on this scale implies the need for considerable resources, particularly staffing. At the current average staffing ratios in special schools of around 1:10 (ranging from 1:6 to 1:16), expanding the system on the conventional model would be impossible. However, it is expected that in an inclusive education and training system, as the majority of individuals with barriers to learning are integrated into 'full service' schools so as to achieve a 'natural' geographical distribution of such learners as opposed to the current distorted pattern resulting from apartheid, a more efficient system will result with respect to the usage of both limited financial resources and specialist staff. When schools are fully inclusive, a situation should ensue that on average, a school's population will comprise no more than a small percentage of individuals with special education needs. Given these small absolute numbers of learners in a school, it makes sense for specialist teachers not to be based at each school, but as the White Paper outlines, at the district level to be drawn upon by each school as required.

3.5 Costs attached to expanding access and provision

3.5.1 A large proportion of the additional costs in the short- to medium term relate to:

- Providing for the approximately 280,000 children and youth not in the education system; and
- Converting primary schools (and later, secondary schools and colleges) to full service schools, eventually at least one such school in each school district in the country.

3.5.2 Both of the above have funding implications relating to the provision of necessary physical and material resources and the staff and requisite professional development. In addition, with respect to the recruitment of 'out-of-school' learners, a sustained information, advocacy and mobilization will need to be undertaken.

3.6 Funding strategy

3.6.1 As stated earlier, the inclusive education and training system will include a range of different institutions, including special schools/resource centres and designated full service and other schools, public adult learning centres and further and higher education institutions. The vision and goals articulated in this White Paper reflect a twenty-year developmental perspective.

3.6.2 For the short- to medium term, that is the first five years, a three-pronged approach to funding is proposed with new conditional grants from the national government, funding from the line budgets of provincial education departments and donor funds, constituting the chief sources of funding.

3.6.3 A funding approach that separates personnel and non-personnel resources will be adopted. The generation and distribution of personnel resources will be determined through the post-provisioning process while the School Funding Norms will govern the generation and distribution of non-personnel resources.

3.7 Conditional grants

3.7.1 New conditional grant funding from the national government is proposed for non-personnel funding for the first five years. In particular such funding will be used for two purposes. First, it will used in both special and full service schools to provide the necessary facilities and other material resources needed to increase access for those currently excluded. Second, it will be used to provide some of the non-educational resources that will be required to ensure access to the curriculum such as medication, devices such as wheelchairs, crutches, hearing aids, guide dogs, interpreters and voice activated computers, and social workers.

3.7.2 Further investigation will be undertaken by the Ministry regarding the magnitude of these expenditures and how they can be phased in over the next five-year period.

3.8   Budgets of the provincial education departments

3.8.1   The budgets of provincial education departments will need to be reviewed and reformulated to meet some of the needs of the proposed inclusive education and training system.

3.8.2   The audit of programmes offered by existing special schools will help inform the development of a spectrum of programme costs varying from cheapest to most expensive.

3.8.3   With respect to staffing, the objective of the post-provisioning strategy is to allocate posts in accordance with the actual educational support needs of the learners concerned and not, as is currently the case, on the basis of category of disability. The revised resourcing model would create a dedicated pool of posts for the educational support system.

3.8.4   The achievement of this objective necessitates a revision of the current post establishment model.   Such a revision will focus on the development of an appropriate post distribution mechanism, guidelines for post utilisation and structural and organizational arrangements to ensure flexibility in the deployment of posts.   Particular attention will be given to optimising the expertise of specialist support personnel such as therapists, psychologists, remedial educators and health professionals.

3.8.5   Teaching posts would be allocated to all schools in terms of the existing post distribution model. In filling these posts school management is obliged to ensure that the learners who "generated" the posts are adequately catered for through appropriate and effective educational programmes.

3.8.6   A pool of posts for the district support teams and special schools/resource centres to provide support to schools will be created in terms of a formula related to the differing levels of programme costs. These posts will be top-sliced from the total pool of posts in a province before the post distribution model is applied to schools.

3.8.7   These posts together with those traditionally allocated to provincial education support services would thus form a pool of specialists, with appropriate expertise and experience. Posts would therefore be utilised for the deployment of resource persons that could provide direct interventionist programmes to learners in a range of settings, and/or serve as "consultant – mentors" to school management teams, classroom teachers and school governing bodies.

3.8.8   It should be emphasised that no real increase in the fiscal envelope is envisaged in this staffing strategy in the short to medium-term. What is being proposed here is a much more cost-effective use of specialist teachers than is currently the practice.

3.9   Donor funding

3.9.1 Donor funding will be mobilised for short-term activities. Two such activities are described in the White Paper:

- The audit of existing state special schools as well as independent special schools; and
- The national information, advocacy and mobilisation campaign to expand access to those previously excluded.

3.10   Further education and training and higher education

3.10.1 With regard to further education and training, the Ministry will undertake a study to determine the costs attached to the establishment of full-service further education and training colleges that mirror the general education sector. As stated earlier, the Ministry will link the learning of individuals with disabilities stemming from impaired intellectual development and who do not require intensive support to the general restructuring of the further education and training sector currently being undertaken by the Department. The funding arrangements for these full-service colleges will therefore constitute a sub-set of the broader funding strategy for the further education and training sector.

3.10.2 The National Plan for Higher Education requires higher education institutions to increase the participation of learners with special education needs. The Ministry therefore expects institutions to indicate in their institutional plans the strategies, steps and time-frames they intend taking to increase enrolment of these learners. The Ministry will also make recommendations to higher education institutions regarding minimum levels of provision for learners with special needs. However, all higher education institutions will be required to ensure that there is appropriate physical access for physically disabled learners. It will not be possible to provide relatively expensive equipment and other resources, particularly for blind and deaf students, at all higher education institutions. Such facilities will therefore have to be organised on a regional basis.

3.11   The time frame

3.11.1 As stated earlier, a realistic time frame of twenty years is proposed for the implementation of the inclusive education and training strategy. This implementation plan can be broken down as follows:

- **Immediate to short–term steps (2001-2003):** The necessary steps will include:
  a) Implementing a national advocacy and education programme on inclusive education.
  b) Planning and implementing a targeted outreach programme, beginning in Government's rural and urban development nodes, to mobilise disabled out of school children and youth.

c) Completing the audit of special schools and implementing a programme to improve efficiency and quality.

d) Designating, planning and implementing the conversion of thirty special schools to special schools/resource centres in thirty designated school districts.

e) Designating, planning and implementing the conversion of thirty primary schools to full service schools in the same thirty districts as (d) above.

f) Designating, planning and implementing the district support teams in the same thirty districts as (d) above; and

g) Within all other public education institutions, on a progressive basis, the general orientation and introduction of management, governing bodies and professional staff to the inclusion model.

h) Within primary schooling, on a progressive basis, the establishment of systems and procedures for the early identification and addressing of barriers to learning in the Foundation Phase (Grades R-3).

- **Medium-term (Years 2004-2008):** The major steps are:

i) Transforming further education and training and higher education institutions to recognise and address the diverse range of learning needs of learners, especially disabled learners;

j) Expanding the targeted community outreach programme in (b) from the base of Government's rural and urban development nodes to mobilise disabled out-of-children and youth in line with available resources.

k) Expanding the number of special schools/resource centres, full-service schools and district support teams in (d), (e) and (f) in line with lessons learnt and available resources.

- **Long-term (2009-2021):** Expanding provision to reach the target of 380 special schools/resource centres, 500 full service schools and colleges and district support teams, and the 280,000 out of school children and youth.

3.12 Summary

3.12.1 The funding strategy that is proposed in this White Paper is a realistic one that takes into account the country's fiscal realities. The important features of this strategy are its emphasis on cost-effectiveness and exploiting the economies of scale that result from expanding access and provision within an inclusive education and training system.

3.12.2 For the short- to medium term, that is the first eight years, a three-pronged approach to funding is proposed with new conditional grants from the Government, funding from the line budgets of provincial education departments and donor funds, constituting the chief sources of funding.

3.12.3 Further investigations will be undertaken by the Ministry regarding the magnitude of these expenditures and how they can be phased in over the five-year period.

3.12.4 In order to develop a feasible implementation plan for the envisaged twenty-year period a number of research tasks will need to be undertaken. Such research will inform the development of the implementation plan particularly with respect to the financial, human resource and institutional constraints identified earlier. Research will include the following:

- Costing of an ideal district support team.
- Costing the conversion of special schools to a special schools/resource centres.
- Costing of an ideal full-service school.
- Costing of a "full service" technical college.
- Determining the minimum levels of provision for learners with special needs for all higher education institutions.
- Devising a personnel plan; and
- Costing non-personnel expenditure requirements.

CHAPTER 4

ESTABLISHING THE INCLUSIVE EDUCATION AND TRAINING SYSTEM

4.1   Our long-term goal

4.1.1   Our long-term goal is the development of an inclusive education and training system that will uncover and address barriers to learning, and recognise and accommodate the diverse range of learning needs.

4.1.2   This long-term goal is part of our programme to build an open, lifelong and high quality education and training system for the 21st Century.

4.1.3   The inclusive education and training system shall include a range of different institutions, including special schools/resource centres and designated full service and other schools, public adult learning centres and further and higher education institutions.

4.1.4   The vision and goals that we have outlined in this White Paper reflect a twenty-year developmental perspective.

4.2   Our short-term to medium-term goals

4.2.1   Our short-term to medium-term goals will focus immediately on addressing the weaknesses and deficiencies of our current system and on expanding access and provision to those of compulsory school-going age who are not accommodated within the education and training system. In this manner we shall begin to lay the foundations for the kind of education and training system we wish to build over the next twenty years.

4.2.2   Below we outline in more detail the strategic changes that we shall introduce over the next eight years. These focus on the revision of all policies, legislation and structures that are necessary to facilitate the transformation process. This period will also include a public awareness and advocacy campaign, the development of the appropriate and necessary capacities and competencies at all levels of the system and the rationalisation and efficient combination of limited resources. It will also include the development of those mechanisms within the system that are central to increasing access, to accommodating diversity and to addressing barriers to learning. This period will also see the development of the district and learning institutional-based support system and the establishment of evaluation and monitoring measures.

4.3 Strategic areas of change

4.3.1 Building capacity in all education departments

4.3.1.1   The Department of Education and the nine provincial departments of education will play a critical role, particularly over the next eight years, in laying the foundations of the inclusive education and training system. This will require that we will have to establish an effective management, policy, planning and monitoring capacity in the Department of Education, under senior departmental leadership, to guide and support the development of the inclusive education and training system.

4.3.1.2   Since the provincial departments of education will play the key role in building institutional capacity and in managing the introduction of the inclusive education and training system, the Department of Education shall assist provincial education departments to develop effective management systems and capacity in respect of strategic planning, management information systems, financial management and curriculum development and assessment.

4.3.1.3   As provided for in the Constitution, the Minister of Education will, on the principles of co-operative governance, determine national policy, norms and standards for establishing the inclusive education and training system, and will together with the nine Members of the Provincial Executive Councils responsible for education oversee the laying of the foundations of the inclusive education and training system.

4.3.2 Strengthening the capacities of all advisory bodies

4.3.2.1   All advisory bodies will play a critical role in providing advice to the Minister of Education on the goals, priorities and targets for the establishment of the inclusive education and training system.

4.3.2.2   Accordingly, the Ministry shall review, and where appropriate strengthen the memberships of these advisory bodies so that they can provide appropriate and timely advice on these matters.

4.3.2.3   The memberships of provincial advisory bodies shall similarly be reviewed and where appropriate, strengthened.

4.3.3 Establishing district support teams

4.3.3.1   In collaboration with the provincial departments of education, we shall strengthen the education support service that shall have at its centre new district-based support teams. These teams shall comprise staff from provincial district, regional and head offices and from special schools. Their primary function will be to evaluate and, through supporting teaching, build the capacity

of schools, early childhood and adult basic education and training centres, colleges and higher education institutions to recognise and address severe learning difficulties and to accommodate a range of learning needs.

4.3.3.2   We shall establish district support teams first in the thirty districts that form part of the District Development Programme and, on the basis of lessons learnt, consider expanding these to the remaining school districts.

4.3.4 Auditing and improving the quality of and converting special schools to resource centres

4.3.4.1   In collaboration with the provincial departments of education we shall complete a quantitative and qualitative audit of education provision of all 380 public special schools and independent special schools with a view to improving the quality of their services.

4.3.4.2   Also, based on the outcomes of these audits, special schools shall be converted to resource centres that shall have two primary responsibilities. First, the new resource centres shall provide an improved educational service to its targeted learner population. Secondly they shall be integrated into district support teams so that they can provide specialised professional support in curriculum, assessment and instruction to designated full service and other neighbourhood schools.

4.3.4.3   The conversion of special schools to resource centres will necessitate their upgrading and the training of their staff for their new roles as part of district support teams.

4.3.4.4   Conditions of service and the post-provisioning model for educators shall be reviewed to accommodate the approaches put forward in this White Paper – district support teams, special schools/resource centres and full service educational institutions – while retaining, as far as is possible the services of specialist personnel.

4.3.5 Identifying, designating and establishing full service schools, public adult learning centres, and further and higher education institutions

4.3.5.1   In collaboration with the provincial departments of education, and beginning in the thirty districts that form part of the District Development Programme, we shall identify and designate primary schools for conversion to full service schools so that we can expand provision and access to disabled learners within neighbourhood schools. Based on lessons learnt, at least one primary school per district will be designated as a full service school. Full service schools will be provided with the necessary physical, material and human resources and professional development of staff so that they can accommodate the diverse range of learning needs.

4.3.5.2   In the further education and training sector, the Ministry shall link the provision of education of learners with disabilities stemming from impaired intellectual development and who do not require intensive support to the general restructuring of the further education and training sector currently being undertaken by the Ministry. It is likely that a similar model to that proposed for general education will be developed for the colleges, namely that there will be dedicated special colleges which will mirror the full service schools in the general education sector.

4.3.5.3   In the higher education sector, and as part of the National Plan for Higher Education, the Ministry will require all higher education institutions to indicate in their institutional plans the strategies, steps and time-frames they intend taking to increase enrolment of learners with special education needs. The Ministry will undertake investigations and make recommendations to higher education institutions regarding minimum levels of provision for learners with special needs. However, all higher education institutions will be required to ensure that there is appropriate physical access for all physically disabled learners. At the level of education provision, it will be fiscally possible to provide relatively expensive equipment, particularly for blind and deaf students, only at some of the higher education institutions. Such facilities will have to be rationalised on a regional basis.

4.3.6 Establishing institutional level support teams

4.3.6.1   At the institutional level, in general, and further education, we shall assist institutions to establish institution-level support teams. The primary function of these teams will be to put in place properly co-ordinated learner and educator support services that support the learning and teaching process by identifying and addressing learner, educator and institutional needs. Where appropriate, institutions should strengthen these teams by expertise from the local community, district support teams and higher education institutions. District support teams will provide the full range of education support services such as professional development in curriculum and assessment to these institutional –level support teams.

4.3.7 Assisting in establishing mechanisms at community level for the early identification of severe learning difficulties

4.3.7.1   In collaboration with the provincial departments of education and the Ministries of Health and Welfare, the Ministry shall investigate how learners that experience severe barriers to learning during the pre-school years can be identified and addressed. Mechanisms and measures to be investigated will include the role of community-based clinics and early admission of such learners to special schools/resource centres and full service and other schools.

4.3.7.2   In collaboration with the provincial departments of education the Ministry shall investigate measures to raise the capacity of primary schools for the early identification and support of learners who experience barriers to learning and require learning support

4.3.8 Developing the professional capacity of all educators in curriculum development and assessment

4.3.8.1   We shall require that all curriculum development, assessment and instructional development programmes make special efforts to address the learning and teaching requirements of the diverse range of learning needs and that address barriers to learning that arise from language and the medium of learning and instruction, teaching style and pace, time-frames for the completion of curricula, learning support materials and equipment, and assessment methods and techniques.

4.3.8.2   District support teams and institution-level support teams will be required to provide curriculum, assessment and instructional support in the form of illustrative learning programmes, learner support materials and equipment, assessment instruments and professional support for educators at special schools/resource centres and full service and other educational institutions.

4.3.8.3   The norms and standards for teacher education will be revised where appropriate to include the development of competencies to recognise and address barriers to learning and to accommodate the diverse range of learning needs.

4.3.8.4   The eighty hours annual in-service education and training requirements of educators by the Government will be structured in such a manner that they include the requirement to complete courses relating to policies and programmes put forward in this White Paper.

4.3.9 Promoting quality assurance and quality improvement

4.3.9.1   The Ministry shall require that all quality assurance bodies created for the education sector develop their programmes of quality assurance taking into account the current and future access and provision of educational services for learners with disabilities, including how special schools/resource centres, full service and other educational institutions can uncover and address barriers to learning.

4.3.10 Mobilising public support

4.3.10.1   In collaboration with the provincial departments of education, the Ministry will launch an information and advocacy campaign to communicate the policy

proposals contained in this White Paper, including the rights, responsibilities and obligations attached to these.

4.3.10.2   The Ministry will also continue its discussions with all national community-based organisations, NGOs, organisations of the disabled, health professionals and other members of the public who will play a central role in supporting the building of the inclusive education and training system.

4.3.10.3   At the educational institutional level, partnerships shall be established with parents so that they can, armed with information, counselling and skills, participate more effectively in the planning and implementation of inclusion activities, and so that they can play a more active role in the learning and teaching of their own children, despite limitations due to disabilities or chronic illnesses.

4.3.11 HIV/AIDS and other infectious diseases

4.3.11.1   The Ministry will, on an ongoing basis, analyse the effects of HIV/AIDS and other infectious diseases on the education and training system.

4.3.11.2   The Ministry will develop and implement appropriate and timely programmes, including strengthening our information systems, establishing a system to identify orphans, co-ordinate support and care programmes for such learners, put in place referral procedures for teachers, and develop teaching guidelines on how to support orphans and other children in distress.

4.3.11.3   In this regard, the Ministry will work closely with provincial departments of education and the Departments of Social Development, Health and the Public Service Administration.

4.4.12 Developing an appropriate funding strategy

4.4.12.1   The funding strategy that is proposed in this White Paper is a realistic one that takes into account the country's fiscal capacity. The important features of this strategy are its emphasis on cost-effectiveness and exploiting the economies of scale that result from expanding access and provision within an inclusive education and training system.

4.4.12.2   For the short- to medium term (that is, the first eight years) a three-pronged approach to funding is proposed with new conditional grants from the national government, funding from the line budgets of provincial education departments and donor funds, constituting the chief sources of funding.

4.4.12.3   Further investigation will be undertaken by the Ministry regarding the magnitude of these expenditures and how they can be phased in over the eight year period.

Annexure A

RESPONSE TO SUBMISSIONS RECEIVED IN RESPONSE TO CONSULTATION PAPER NO 1: SPECIAL NEEDS EDUCATION – BUILDING AN INCLUSIVE EUDCATION AND TRAINING SYSTEM

1. In response to this Consultative Paper, fifty-nine written submissions by individuals, organisations, institutions and many national and provincial departments were received. Disappointingly, only one of these submissions advised on higher education, and none on the education sub-systems of early childhood, adult basic and further education and training.

2. Since many of the submissions have argued passionately in favour and against the key principles and policy framework put forward in the Consultative Paper, the Ministry chose to provide these as well as responses in summary form below.

Premature implementation of policy recommendations

3. Public comment drew attention to the premature and disorderly implementation of the joint policy recommendations of the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services in some provinces despite the absence of national policy, and highlighted the indiscriminate closure and threat of closure of special schools. The Ministry acknowledges that these actions have created uncertainty about the future of these institutions and have worsened the already rapidly declining quality of provision described in the Consultative Paper. The Ministry has already taken steps to reverse this situation.

Terminology

4. Many submissions put forward the view that the Consultative Paper represented a retreat from the joint report of the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services and that it was beset with contradictions. In this respect, it is argued in these submissions, the Consultative Paper embraced the groundbreaking approach of the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services that learning difficulties do not only reside in learners but also reside within the learning system. Typically in this approach, physical plant, curricula, assessment, learning materials and instruction are outdated and provide inadequate access for most learners, and as many as 70% of learners face such daily "barriers" resulting in many being pushed out or drop out of the learning system (Department of Education. *Quality Education for All: Overcoming Barriers to Learning and Development*. Joint report of the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services. February 1998).

5. Despite embracing this groundbreaking approach, these submissions suggest that the Consultative Paper opts to use outdated terminology such as "learners with special education needs" and "learners with mild to severe learning difficulties" which are signifiers of the "deficit" or "medical" model in which barriers to learning are assumed to reside primarily within the learner. Also, the strategy of targeting "learners with mild to severe learning difficulties" put forward in the Consultative Paper is argued to be outdated since most learners within mainstream education experience "barriers to learning". Instead of targeting a minority of learners the focus should be moved to the entire learning system and the "barriers" that exist there. In this manner, these submissions hold, the Consultative Paper moves away from the recognition that "barriers" to learning reside primarily in the learning system where they should be removed. We respond fully to this criticism below.

6. Public comment also indicated preference for the ground-breaking terminology put forward by the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services, arguing that this terminology - "barriers to learning and development" for signifying that barriers exist primarily within the learning system - was already widely in use by many specialists and practitioners, a reflection of the wide consultation held and consensus developed by the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services.

7. The Consultative Paper proposed an implementation strategy that prioritises the upgrading and conversion of all 378 special schools and specialised settings and their inclusion within new district-based support teams, increasing access to learners outside of the education and training system and the optimal use of limited resources. For these to be accomplished, the Consultative Paper put forward proposals for the revision of all education and training policies and legislation, including curriculum, assessment, quality assurance and funding, the strengthening of the special education needs capacities of all advisory bodies, the creation of barrier-free learning environments, the provision of appropriate professional development to education managers, educators and support personnel and the mobilisation of parents and communities behind inclusion. Most of the public comment focused in on the ranking of these priorities and actions.

8. Many submissions supported the idea of giving priority to special schools and specialised settings for qualitative improvement as a first step to their expanded roles within an inclusive system. These submissions point to the premature implementation of the inclusive model resulting from the premature implementation of the policy recommendations of the National Commission on Special Needs in Education and Training and the National Committee on Education Support Services. In this respect they draw attention to the closure of some special schools and threats to the closure of others, the scaling down of funding of these schools and settings by some provincial departments of education, all of which have created uncertainty about their future, thus exacerbating the declining quality of provision.

They suggest that immediate mainstreaming would result in these learners in special schools and settings receiving an even worse education given the challenges facing mainstream schools such as high learner-classroom and high learner-educator ratios. These submissions suggest that the competencies required to support these learners in mainstream education would represent another barrier to learning for these learners.

9. Many other submissions put forward the view that strengthening specials schools and specialised settings this would be a retrogressive approach and that these schools and settings should either be incorporated immediately as resource centres into district-based support teams or be abolished and learners admitted to neighbourhood schools. These submissions suggest that many disabled children are outside of any learning institution; others suggest that most learners who experience barriers to learning and exclusion are within mainstream schooling and receive little or no education support. Accordingly, they suggest that the focus on special schools and specialised settings is misplaced. Instead, policy should target the approximately 400,000 disabled children who receive no education and training and the approximately 70% of learners in mainstream education who receive little or no education support service yet experience barriers to learning and exclusion. These submissions suggest that learners attending special schools and specialised settings should be accommodated within the local neighbourhood school thus ending the isolation and stigmatisation of disabled learners. Moreover, the high-cost high-intensive resources allocated to special schools and specialised settings should be used more efficiently within an inclusive single mainstream education and training system. In this manner, these submissions suggest the high costs of hostels and transport associated with special schools and settings would be eliminated.

10. Several submissions requested clarification about what is meant by "an inclusive education and training system". From one such submission came the following advice that is embraced. Inclusive education and training

❑ Is about acknowledging that all children and youth can learn and that all children and youth need support.
❑ Is about enabling education structures, systems and learning methodologies to meet the needs of all learners.
❑ Acknowledges and respects differences in learners, whether due to age, gender, ethnicity, language, class, disability, HIV status, etc.
❑ Is broader than formal schooling and acknowledges that learning also occurs in the home and community, and within formal and informal manners.
❑ Is about changing attitudes, behaviour, methodologies, curricula and environments to meet the needs of all learners.
❑ Is about maximising the participation of all learners in the culture and the curriculum of educational institutions and uncovering and minimising barriers to learning.

Other comments

11. Here is a list of other important suggestions or proposals:

    ❑ "Full service" schools should be designated in each district for the implementation of the inclusion model, especially since it is unimaginable how all 29,000 public schools could all provide the full range of physical and material resources required – e.g. Braille writers, voice synthesisers, hearing aids and adapted information and communications technologies - and the staff to accommodate the full range of diverse learning needs.

    ❑ Learners who require education support through for example the tailoring of curriculum, instruction and assessment should be identified early, and for this purpose the Foundation Phase (Grades R-3) should be prioritised.

    ❑ Since learners are more independent after the Foundation Phase, implementation of the inclusion model or mainstreaming of learners should begin after Grade 3.

    ❑ Special schools and settings should be converted to resource centres that provide specialised professional support in curriculum, assessment and instruction to neighbourhood schools in addition to serving its own expanding learner base.

    ❑ For the inclusive model to work, designated posts should be created in all schools for the development and co-ordination of school-based support for all educators.

    ❑ Instead of rhetorically stating that the new outcomes-based curriculum accommodates all learners within a single learning programme, district-based support teams should provide curriculum, assessment and instruction support in the form of illustrative learning programmes, learning support materials and assessment instruments to special schools and specialised settings.

    ❑ The needs of parents of disabled learners or learners at risk should be taken into account and they should be provided with information, counselling and skills to support their children.

12. All of these submissions have enriched and contributed valuably to this White Paper.

13. It is worth noting that the policy framework put forward in this White Paper addresses the full range of diverse learning needs within all bands of the education and training system. The policy framework is therefore neither limited to the traditional special education domain nor to general school education. The Ministry believes that for us to pursue successfully the agenda outlined in this White Paper, we must recognise that learning difficulties are located and experienced within all bands of education and training – general, further and higher education and training - and across the curriculum and instruction.

14. In addressing these matters, we restate what we recorded in the Consultative Paper, viz., in addressing itself to these matters, the White Paper builds upon those processes that are aimed at facilitating transformation at the critical points of the system. The White Paper is released at a time when policy development is completed or at an advanced stage for all bands of education and training. The intention is therefore not to replace these policies with a new set such as those included here. Rather, it is to revise these since these policy development processes have not all fully benefited from the review and advisory process on education for learners with special education needs. Accordingly, this White Paper extends, rather than replaces critical projects such as Curriculum 2005, the Ministry's five-year plan, *Tirisano*, the development of new quality assurance policies, methods and instruments, the norms and standards for teacher education, the higher and further education planning processes and the development of effective education management and governance capacity across the system.