

# **Loose Coupling and Inhabited Institutions: Inclusion Policy and Teacher Strategies**

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## ***Abstract***

*This case study uses interviews and participant observation to study how teachers negotiate inclusion policy in their everyday classroom interactions and strategies. Interviews consisted of two teachers and an educational assistant from one Northern Ontario classroom while participant observation was conducted for a period of seven weeks. Drawing from the framework of loose coupling and inhabited institution, this study finds that teachers actively negotiate policy in the face of classroom reality by drawing upon personal and social resources. Drawing from their previous experiences and some of their educational training they create, and implement strategies in dealing with learning diversity. Teachers felt enthusiastic about inclusion but their ideas ranged as to what it looked like; on top of their creativity in strategy making they also expressed the need for more resources and support to ensure the success of inclusion within their classrooms.*

*Keywords: inclusion, inhabited institutions, loose coupling, learning disabilities*

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### **Loose Coupling and Inhabited Institutions: Inclusion Policy and Teacher Strategies**

In education, there are often major differences between the perspectives of educational leaders, those who develop policy, and the teachers who implement them in classrooms and schools (Darling-Hammond & Bransford, 2005). This is evident in the ways in which policy-makers and teachers have understood the goals of inclusive education and how to apply them in Canadian and American contexts (for examples see Porter & Richler, 1991; Stainback & Stainback, 1996). Strategies proposed for the implementation of this policy initiative are varied and include differentiated and direct instruction, universal design for learning, and altering expectations. Although research on educator practices and strategies within the inclusive elementary classroom has been extensive, research fails to fully capture how teachers grasp the policies handed down to them from administration (Labaree, 2010) and the process by which teachers make meaning from such policies (Laurin-Bowie, 2009).

Inclusion can have many meanings, conceptions, and is practiced in varying ways by teachers (Laurin-Bowie, 2009; Lloyd, 2002). For example, the Ontario Ministry level means “not only the practice of placing students with special needs in the regular classroom but ensuring that teachers assist every student to prepare for the highest degree of independence possible” (Ontario Ministry of Education, 2005, p. 2). However, interviews with teachers in this project yielded two different responses including “making it possible for kids who have exceptionalities to function within the classroom” (Mrs. M) versus having “people in a classroom, some of which learn differently from others...it means that everybody’s needs are met within the classroom” (Mrs. C). Inclusion can also mean various things at various levels of implementation; for example, administration at both provincial and board level can feel it encompasses political ideologies and public sentiment, but this definition changes at the classroom level. Autonomy, past experiences, and resources all play a variable role in the definition and implementation of inclusion (Avrimidis & Kalyva, 2007; Jung, 2007) and can be captured in the idea of loosely coupled systems (Ingersoll, 1990; Meyer & Rowan, 2006; Weick, 1976), and inhabited institutions (Hallett & Ventresca, 2006a). Loose coupling refers to the implementation of policy without adequate consideration of the realistic conditions of the classroom while inhabited institutions refer to the active negotiation of meaning and relationships, which occupy an institutions livelihood.

This study addresses four key research questions: How do various participants in the classroom and school view inclusion? How are teachers practicing inclusion? What are the frustrations and consequences of such implementation in the classroom as a whole? And how do concepts of loose coupling and inhabited institutions help understand the logic of classroom practice? In doing so this study draws upon these two concepts: loose coupling and inhabited institutions, in understanding how one Ontario classroom implemented Ministry directed inclusion policy and in answering some of these questions.

### **Loose Coupling to Inhabited Institutions**

Schools often implement policies of equality and rights to education and have stakes in these claims, but fail to account for how to adequately implement such claims within the reality of the classroom (Davies & Guppy, 2010). Stating these grand claims, or what is termed “myths” such as rules and regulations which are implemented on a grand scale, legitimize the institution’s

authority (Aurini, 2006; Meyer & Rowan, 1977), are part of the institutional order and the development of education on a global scale (Meyer & Rowan, 2006). But as Hallett (2007) states, institutional policies and claims usually flow downward to more intimate and negotiated levels at which they are interpreted and implemented by individual actors. The isomorphic character of education, however, fails to acknowledge how individual actors make meaning from these policy claims, enact and negotiate such meaning within various relationships, and it does not account for the creativity that actors have in implementing these policy suggestions (Binder, 2007). Thus, education is characterized by a top-down method, the efficiency of which depends on the individuals and not the rules guiding it (Coburn, 2004; Dean & Celotti, 1980; Ingersoll, 1993; Murphy & Hallinger, 1984; Weick, 1976). As a result of the disparate relationship between claims and practices, education has been viewed as a loosely coupled system (Dean & Celotti, 1980; Ingersoll, 1990; Meyer & Rowan, 2006; Murphy & Hallinger, 1984; Weick, 1976). Loose coupling, then, has been defined as individual components interrelated, in some way, but at the same time retaining independence from one another (Hallett, 2010; Orton & Weick, 1990; Weick, 1976). Despite the policy changes, which take place at the structural level, individual practice remains the same and separate from rhetoric (Scott 2008). This concept of loose coupling has been pervasive in research because it allows researchers to explain both the rationality and irrationality of various institutional aspects of education (Orton & Weick, 1990). These irrational aspects include the effectiveness of such policy implementations where the implementation was out of some contentious global need (Hogan, 1990); but this implementation was left to teachers' devices (Leiter, 1986). Thus, it is difficult for administrators to control the work that is being implemented in the classroom since a key feature of loose couplings is the autonomy that individual workers have within the institution (Gamoran & Dreeban, 1986) and the lack of feedback from one component to another (Ingersoll, 1990).

As a result, researchers have called for conceptions of agency to be included in ideas of loose coupling (Binder, 2007; Hallett & Ventresca, 2006a). Teachers practice autonomy in a variety of ways once a policy is implemented but these can be constrained by resources and various other factors (Gamoran & Dreeban, 1986). Loose coupling, although credible for challenging the notions that institutions operate with clear goals, rationales, and objectives in mind (Hallett & Ventresca, 2006a), fails to capture the autonomous nature of individual actors and how claims are negotiated by them (Hallett & Ventresca, 2006b). Coburn (2004) points out that teachers respond to the pressures from administrators by five different manners: rejection, decoupling/symbolic response, parallel structures, assimilation, and accommodation; whereas Bascia and Rottamn (2011) state that teachers also incorporate their own perceptions of success and definitions of good teaching in negotiating these policies. Teachers often employ creative strategies for these policies while administrators seek to break these individual practices and other routines (Dean & Celotti, 1980) and in turn, try to implement more routine and standardized and proven methods; thus, there is an inherent conflict and this requires a reconceptualization of teachers work within the confines of broad sweeping institutional goals.

In response, Hallett and Ventresca (2006b) discuss policies and practices existing together in inhabited institutions. They argue that institutions provide a rich setting of negotiated meaning between and amongst individuals. Inhabited institutions, first discussed by Scully and Segel (as cited in Hallett & Ventresca, 2006b), can be defined as resolving the debate between agency and structure; rather, inhabited institutions encompass how agents create couplings between practice and policy together (Hallett & Ventresca, 2006b). Inhabited institutions can be

literally defined as institutions occupied and produced by individual negotiations and decisions. Understanding how teachers exist within inhabited institutions requires that we understand how meaning is made and used both implicitly within social interactions and within the classroom (Hallett & Ventresca, 2006b). Hallett (2007) also adds that it is also necessary to draw on concepts such as symbolic power to fully understand teachers' actions. In his study, Hallett (2007) found that the symbolic power exerted by educational authorities is less overt but still exerts immense institutional pressure on teachers, forcing them to comply with policies in their own way. Working conditions within the classroom can also affect teachers' self-perceptions of effectiveness of strategies (Bascia & Rottman, 2011); but understanding how these meanings are made requires a more in-depth approach to studying teachers' strategies.

Belatedly, this new institutional framework has used more qualitative approaches to understand how claims or myths are constructed and implemented within the educational setting. Aurini (2006) draws on qualitative interview data, participant observation, and content analysis to examine how private tutoring businesses and learning centers developed as legitimization projects, highlighting the three mechanisms which were essential to this process: myth-making, coupling, and the logic of confidence (Aurini, 2006). Her data yielded myth-making practices in a few ways: setting up curriculum and guidelines that addressed outside demands but also environmental concerns, especially anxiety-filled parents; hiring of uncertified individuals to disseminate these strategies with little room to modify the given program (Aurini, 2006, p. 98); and retaining essential characteristics of schools. She also finds that these private tutoring businesses coupled their programs to student outcomes by relying on past assignments and grades of students and monitoring progress in short-term increments (Aurini, 2006).

Adding to these ideas, Binder (2007) qualitatively examines the concept of inhabited institutions. She asks how actors couple their strategies with the pressures being exerted upon them and what tools they draw on in making these decisions. She argues that by acknowledging the role of inhabited institutions researchers can account for how individuals make sense and interpret institutional claims and myths. Inhabited institutions are places in which individuals gather and interpret information on their clients and make decisions, which sometimes depart from official policy but may embrace institutional objectives and logic (Binder, 2007, p. 551). Binder addresses these issues by studying three different subunits from a case study of Parents Community where she conducted interviews over a period of two years. She finds that inhabited institutions was useful in not only accounting for how various departments may be linked and relate differently to claims but also how individuals are creative and engage with multiple logics in this process (Binder, 2007).

This study aims to add to the growing qualitative research surrounding the coupling of practice with policy rhetoric (Labaree, 2010). In acknowledging that policy, such as the recent *Education for All* policy released by the Ministry of Education in Ontario, has idealistic hopes, it neglects to penetrate to the core of educational practices (Labaree, 2010), that is teacher and student dynamics and circumstances. These educational practices are negotiated and formed by a variety of factors and in a variety of relationships within a variety of settings and as previous literature has shown these variables are in abundance.

### Research on Inclusion Practices and Strategies

Teachers are increasingly pressured within the classroom to meet a diverse array of exceptionalities and needs within the classroom but also have to adhere to curriculum and board expectations (Florian, 2009; McGhie, Underwood, & Jordan, 2007). Their inclusion practices and strategies rely on several factors including their own attitudes and past experiences (Avrimidis & Kalyva, 2007) but also their creativity and ability to relate to children with special needs (Florian, 2009). Teachers' strategies and assessments must be innovative and creative, ensuring that students with special needs are receiving a quality education. They must also involve parents as a means of assessing the child's interests, strengths, and weaknesses (Lapp, Flood, Fisher, Sax, & Pumpian, 1996). Renzaglia et al. (2003) say that it also encompasses the responsibility of all learners in the classroom in accommodating diversity within the classroom, emphasizing a more holistic approach to inclusion. McGhie, Underwood, and Jordan (2007) found that effective inclusion practices include an array of management strategies, modeling, and scaffolding. Inclusion involves various practices and requirements in order to be successful; these include teacher perspectives, knowledge, collaboration, administrative support, instructional repertoire, appropriate assessments, scheduling, and time management (Dymon, Renzaglia, & Chun, 2007; Worrell, 2008).

Implementation of these ideals is another matter as research has indicated. Lapp et al. (1996) found that lack of commitment and resources leads to unfortunate results in the inclusion of students with special needs. With the implementation of inclusive regulations there is certainly a heightened awareness on the part of teachers as to how they will manage all the children in the general education classroom. Hastings and Oakford's (2003) study showed that the attitudes towards special needs students varied depending on the nature of the special needs and teachers' own experiences largely shape attitudes towards inclusion (also see Avrimidis, Bayliss, & Burden, 2000; Burke & Sutherland, 2004). As a result, Goble (1999) highlights that attitudes and reactions leave students often feeling disempowered or unattached to their teachers. Burke and Sutherland (2004) also suggest that the more open teachers are to adapting their teaching styles and strategies, the more accepting they will be of including the child with special needs in the general education classroom. This argument would suggest that the teachers' inability to strategize effectively may be a result of lack of training or experience, something confirmed by Avrimidis et al. (2000) who find that with more experience teachers become more confident in their ability to teach special needs within the inclusive classroom.

Similarly, Mamlin (1999) and Smith and Smith (2000) found that teachers felt uneasy towards inclusion if they lacked adequate training, time, and resources in the implementation of inclusion. Bunch, Lupart, and Brown (1997) echo this finding that teachers' concerns for inclusion fell into two dominant themes: (a) the increased workload that comes with inclusion and the feeling of unpreparedness and lack of professional development in this area and (b) teachers felt positively about being able to accommodate such needs but also collaboratively with all educational actors involved. However, McGhie, Underwood, and Jordan (2007) found that teaching experience and length of time in career had no effect on creation of effective strategies which lead to the question of how inclusion becomes negotiated with the reality of the classroom demands and the various relationships that exist within the classroom.

This study intends to contribute in much the same way as Aurini (2006) and Binder (2007) have; it highlights how teachers engage with policies and claims handed down to them in

a variety of manners, drawing on their own expertise, engaging in negotiations and expertise with and of other teachers, and utilizing various resources and management in tandem. But it also contributes to how teachers create strategies “on the fly” rather than draw on established practices handed down to them.

### Methodology

This case study took place in one school located in Northern Ontario and surveys a number of perspectives using interviews and observations. The classroom was a split grade 2/3 with 25 children all between the ages of 7 to 9; there were 13 girls and 12 boys and only one was a non-Caucasian child. Of these 25 children, 9 of them had a learning disability (LD); these children’s names have been concealed and replaced with pseudonyms. It is important to note that of these 9 children, only 3 had been formally identified and diagnosed with a LD, the other 6 had been given the informal diagnosis of LD and treated accordingly by the special education resource teacher (known as the SERT), as they exhibited various characteristics of a LD, but were awaiting official testing. Of the 3 students that had been formally diagnosed, 2 students had severe reading and writing disabilities while the other child had dyslexia.

According to Ritchie and Lewis (2003), a case study consists of “multiple perspectives and is rooted in a specific context which is seen as critical to understanding the researched phenomena” (p.76). Case study analysis is also essential to understanding and exploring the black box of interactions and processes (Binder, 2007). Perspectives in this study include the classroom teacher, a SERT, and an educational assistant (EA). The teacher and the SERT shared teaching responsibilities in the classroom by co-teaching. In total, they had an accumulated thirty years of teaching experience and an assortment of professional development courses between them. Mrs. C (the SERT) had her special education certification (which entails taking 3 additional courses through an accredited teaching institution and fulfilling a number of in-service hours). She was also the school assigned SERT while Mrs. M (the second classroom teacher) had a number of specialist additional qualification courses. Special Education qualification course part one, within the confines of Ontario licensing, include taking 3 additional qualification courses in Special Education and meeting a specific level of teaching experience and in-service opportunities. In Ontario each specialist additional qualification comprises a three-part system. There was one EA for the entire school. Interviews were semi-structured as this allowed for focusing on the interview without restricting the exploration of new and unexpected information and themes.

Participant observation was used as a means of capturing the interactions of children and teachers but also to experience the classroom environment first hand (Darlington & Scott, 2002). Children were only observed during the classroom times as outside observation was outside of ethical parameters. This occurred for seven weeks, the first two weeks used for familiarity with the classroom and students. This method entailed working with students and teachers regularly while observing the students and teachers when not teaching. Working periods, lesson times, recesses, lunch breaks, and after school were used to record and reflect on observations. Observations included students’ behaviours, interactions with peers, and personal reflections for the day. Lesson implementation, direct instruction, and classroom management were also all part of this repertoire.

The analysis of both observation and interview transcripts was done with Microsoft Word as an organizational tool. The data was sorted out in various themes dictated both by previous literature, and emergent and recurring patterns, but also organized according to the concepts of loose coupling and inhabited institutions. Observations and interview transcripts were sorted for these various themes and concepts but also for recurring words and ideas (Berg, 2001; Yin, 1994). These themes were not only drawn from previous literature and the theoretical framework (Yin, 1994) but were recurring in the data collection and analysis process.

## **Results and Discussion**

The following themes discussed are organized according to recurrent patterns discovered in discussion with teachers and observation of classroom practices: ideas of inclusion, strategies and support, and resources.

### **Ideas of Inclusion**

Teachers spoke favourably about inclusion, and pursued additional training and strategies in the area. Support for this was demonstrated clearly in interviews; however, their ideas of inclusion differed. For Mrs. M, inclusion means:

Well I think for starters these children are going to be part of real life when they are finished school so they might as well do their learning in that setting. I mean, you know to pull them out constantly and have them always working with one on one help maybe would not be a good lesson in independence for them and so as much as they need extra support and more support than the other children, I think they do need to learn how to function within society (Mrs. M).

For her, because the real world was ‘integrated,’ schooling should be as well. The challenge was to provide the students with the additional assistance they needed, while fostering independence that would help them function in society as adults. While the EA felt that inclusion meant that “it is about integrating the students with all the other students, like not separating them; they need to be altogether physically and academically. Students need to be learning together.” Mrs. M felt, however, that “inclusion to me means making it possible for kids who have exceptionalities to function within the classroom” while Mrs. C stated that “inclusion means to me that you have people in a classroom, some of which learn differently from others...it means that everybody’s needs are met within the classroom” (Mrs. C). Teachers, while being interviewed, mentioned on several occasions what they felt an inclusive classroom should look like and feel like. Mrs. C remarked that:

Inclusion means to me that you have people in a classroom, some all the same age, some of them learn differently from others. It means that everybody’s needs are met within the classroom. Now there can be withdrawal from time to time, there can be small group learning, one to one.

Mrs. C's response reveals what Paterson (2007) depicted in his study; rather, that the class was heterogeneous and had differing needs and that both teachers were more concerned with fostering "the whole person" (Paterson, 2007, p. 430). Later on in the interview, Mrs. C stated that she was not sure if it fit with the expectations of inclusion policy but "what you are hoping for is that they take themselves from a point and move forward during the school year." In another interview, Mrs. M. remarked that inclusion meant "making it possible for kids who have exceptionalities to function within the classroom." Yet, she did not mention what the term functioning meant: did this equal success? When asked to explain what an inclusive classroom might look like she stated that "it would be really nice for them to have an EA so that the child can get the one on one help that they need."

When asked if they felt others in their school had the same ideas of inclusion, Mrs. C replied "I know my principal does...I am not sure about the rest of my colleagues, we all have some version of what inclusion is really." Additionally, Mrs. M replied:

I think they do, but I think they have the same challenges I have as well and the same limitations. I think everybody feels the same way. We are really good as working as a team but we are just so understaffed.

To compensate for this lack of assistance and knowledge, teachers were left to their own devices in adapting to the needs of the child. It seems that teachers and the EA essentially bought into the rhetoric of inclusion policy but, like Labaree (2010) states, this rhetoric does not penetrate to the core levels of education: the classroom. Although both teachers mentioned the idea of functioning within the general education classroom, neither mentioned their strategies for ensuring such. The EA, however, elaborated on this stating, "I think it's important for them to be in the class and to learn what the other students are learning, just to modify a little bit for them." Definitions of inclusion, then, differed and as a result so too did strategies utilized in its implementation.

### **Educational Strategies**

Strategies for teachers began from the planning process and both stated this in the interview. Mrs. C remarked

...you are careful about planning your lessons with the needs of the students in mind, this way things go a lot more smoothly. You can do things in pairs, and you can say you need a partner to do this, well kids with special needs will never pick another kid with special needs.

This classroom teacher felt that her positive attitude and her careful planning and strategizing helped in successfully implementing inclusion in the classroom. In doing this, she felt that she was really providing the optimal learning environment for all her students. However, as she notes, "some days are better than others." This planning process did not always outline the detailed strategies these two teachers would use, but the idea of planning is reminiscent of McGhie, Underwood, and Jordan's (2007) study, as part of inclusion includes general organizational strategies and planning.



Many of their strategies centred on classroom management. For instance, teachers carefully organized seating arrangements to minimize talking and disruption, but as Mrs. C stated, “the reality of the learning environment is that there are times when you need quiet but your whole day is not like that.” Teachers, then, had to go with the current of the classroom at the time, and at others times they used very common practices such as grouping students. Children were placed in groups of five to six and these groups were arranged in this manner solely based of the personality and characteristics of the children and to maximize learning. This strategy of classroom management was employed often and seating often changed throughout the time observed, based on new developments of friendships and frustrations of teachers, a negotiation of sorts. The seating arrangements in the classroom had nothing to do with disabilities but rather attempt to prevent students who were more likely to talk from disturbing others around them and to increase learning while decreasing problems and disruptions for both teachers and them.

Another strategy used by one classroom teacher to deal with a child’s behaviour was to encourage him to be responsible for his own behaviour. The system to help Andrew calm down and be self-accountable was set up on a number basis; these numbers range from 1 to 5 and Andrew could go from a 1 to 4 very easily. If he seemed to be frustrated, the teacher would ask what number he was and if he indicated a 4, he was sent to the office to write in his journal, read a calming poem or do something, which he thought would calm him down. If he reached a 5 then his mother was called and he was sent home, as this indicated that he could be harmful to himself or others. Where this strategy for the teacher was learned remained in her previous experiences of children with the same attributes as Andrew, and by workshop material. And although this system was in place, the teachers did not always use this method, and there were times when the child was disciplined without knowing what he had done wrong. He was not asked to rate himself all of the time and the teacher’s attention was geared towards the management of him and the other children in the classroom rather than following her created protocol and proven strategies.

Teachers also used strategies commonly used in all kinds of classrooms like grouping, direct and differentiated instruction, and others. For instance, upon first the day, the teacher gave one set of students their math lesson while the other students were encouraged to complete their work independently. Independent students were highly motivated and often did not have a disability. Students in the classroom were used to this arrangement but it meant that not all received the help they needed. This overlooking, or inability to reach each student with a disability, can only enhance the disempowerment the students with special needs feel (Goble, 1999). More than anything, this situation in the classroom reflects the lack of support that rhetoric often ignores in implementation. The inclusion policy does not gage for the variability of student needs and inadequately addresses how to implement classroom learning with these needs. Although the classroom had two Early Childhood Education (ECE) students from the local college, who would periodically come in to help with the math period and anything else the teacher needed, this did not help much since they did not have the required training or knowledge set. The classroom teacher repeatedly mentioned that she valued another pair of hands in the classroom reflecting what teachers commonly voice, that that they require more help in the classroom such as additional resources, in incorporating inclusion (Sharma, Forlin, & Loreman, 2007).

On another day, sitting with Kylie, Mary, Christine, John, and Kris during the math period and working mainly with Christine and Mary, another event unfolded. Debra joined us but she did not need the help as much as the other two while the rest of the class worked at their own desks while this occurred. The other grade was pulled out of the classroom to work with the ECE student for their math period. This was a teamwork exercise and it assured for the teacher that the students' learning needs were being met in some substantial manner. It "freed some time" for her to work with some of the other students with higher learning needs (as quoted by Mrs. C). Thus, for effective learning to occur, the students were first grouped and then placed in various locations around the classroom and school. Essentially they were segregated from one another, which does not coincide with the idealistic goals of inclusion rhetoric but fits with the practicality and reality of inclusion in the classroom.

This grouping the children was a relatively common practice, as stated earlier, for teachers in dealing with inclusion commonly use this strategy (Zigmond & Baker, 1996) to deal with the variability in learning needs. One observation demonstrates one of the various ways the teachers grouped students:

The students were separated out by grade into two groups; one being instructed by the classroom teacher and the other by an ECE student. A few times, the teacher had to stop what she was teaching to tell one child to calm down and to keep the noise level to a minimum. On another occasion the children were given a spelling test. The spelling test was divided into three groups: each grade and then a combination of the two into a separate group. This separate group consisted of students who had a weakness in spelling and the test consisted of learning five words as opposed to ten words like the other two groups of children. (Observation)

Again, both teachers drew on this grouping strategy in various ways, something that they learned both through experience and basics of teaching pedagogy (mentioned in interviews).

The second most frequent strategy was the altering of assignments and tests as echoed by the work of Zigmond and Baker (1996) where it was common practice in the inclusive classroom. Both teachers during the interviews discussed altering assignments and tests, as Mrs. M points out: "I do simplify the assignments. So for a child, for instance, who has a learning disability, particularly, if it's in the area of math, what I might do is assign two questions as opposed to eight questions." She then said

the other thing I will do is mark them only on the questions they have completed. So if out of the entire test, they have only managed to answer two questions, then I mark them out of those two questions as opposed to out of the whole test.

She even remarked on sending tests home so that particular students could complete it with the help of a parent. Her strategies were mediated by individual student preferences and abilities.

These examples indicate that at times, teachers drew on established teaching practices to cope with the integrated classroom, in their attempts to meet the needs of students at varying levels. Teachers also report devising a number of strategies on their own but at the same time teachers also voiced frustration that they spend too much time "putting out fires" (as Mrs. M

stated in her interview). Another strategy to cope with this was to focus on one child at a time, and leave the others until later:

First it was really difficult because their hands were going up constantly, say for instance in a math assignment or in a writing assignment, the hands were going up constantly cause these kids are not able to work independently at all, and so I was running from one kid to the other around the classroom, trying to sort of meet all of their needs and solve all of their problems and I couldn't do it. I was leaving so frustrated at the end of the day. So what I have done is I have changed my tactic a little bit where I'll sit down and focus with one child and help them work through an entire assignment and that will often mean that seven other children will not get my help when they need but at least for me and the one child that I do work with there is some sense of satisfaction at the end. We've accomplished something. From there, the following period or the following day I'll try to move onto someone else, so that everyone gets some of my attention at some point in the week. (Mrs. M)

Although her experience in neglecting some students while meeting another student's needs seemed to help in managing her frustrations, it only exacerbated the academic frustrations of the ignored students. Note that this was a strategy that she developed on her own, after experiencing considerable frustration and involved a personal negotiation and resolution. The EA mirrored these types of one-on-one strategies when she mentioned in her interview that "if a student is struggling I'll go help them out. I can work with one student in the morning and another in the afternoon." In a sense it was about negotiated time with the teacher's own personal satisfaction and frustration level.

Throughout the seven-week observation period, teachers relied on trial and error strategies, rather than teaching methods they encountered in workshops on inclusion. This does not follow what the *Education for All* campaign, set out by the Ministry of Education, advocates in that teachers should engage with professional development, profiling each student, and assessing them for these needs while drawing upon various strategies outlined in the Universal Design for Learning (UDL) and differentiated instruction. It seems as though the trial and error methods of each teacher began as something derived from professional development but was tailored or changed according to what worked and what did not. And most of these strategies did not work because of the "lack of available hands" (as stated by Mrs. M in an interview), something characteristic of loose coupling. More importantly, it seems as though teachers unconsciously negotiated what rhetoric dictated and the realities of the classroom. Trial and error was really a strategy negotiated between what was dictated to them with what was presented. Interestingly, the classroom teachers would consistently discuss how each child was progressing and pass on any relevant information of prior day events to each other.

There were also more than enough observations made where teachers, or researcher, would work one-on-one with students. For example,

Kylie received some help from the teacher and I and finished her work successfully.  
Kris then was called over by me and forced to focus on the work at hand. He completed it but I had to write all the answers down.

In this instance, children required that we worked with them one-on-one to ensure their work was completed. More than anything, the researcher relied on trial and error, even with her teacher training and the number of workshops she had engaged in both previous to and during this study, none of the strategies were ideal with the reality of the classroom. She was left to navigate what was realistic in terms of strategies and how to alter them to the dynamics of not only the students but the classroom also.

And while teachers did their best to accommodate students within the classroom, there were occasional times that the researcher, EA, or the ECE students would pull students out, either individually or in groups. After reading of the book, I took a group of 2 students, which eventually grew to a group of 5 or 6. I had Andrea and Christine initially and then Kylie, Debra and John all joined; we all read in a group outside the classroom for guided reading.” This pulling out was not in line with what the EA had decided inclusion meant: “it means integrating the students with all the other students, like not separating them (Observation and Reflection).

## Resources

Resources were another predominant theme within the observational and interview data. These resources could be defined in any number of ways by teachers; including resources from which the teachers drew upon for their strategies, such as education and experiences; and also included physical resources like educational assistants, technology and textbook materials. These teachers, in addition to having basic teacher’s education, had other qualifications and worked well as a team rather than as individuals. Scruggs, Mastropieri, and McDuffie (2007) state those teachers who work collaboratively together, such as in this case with the SERT and a regular classroom teacher, proves to be beneficial in implementing inclusion successfully. However, these researchers also expressed that knowledge of inclusion strategies are required by both types of teachers, and more importantly, the SERT (Scruggs, Mastropieri, & McDuffie, 2007). This was seen in this study as both of the teachers participated in workshops and other professional development training, their knowledge was disseminated to other classroom teachers when called upon. There were many times in which classroom teachers and the SERT worked together on devising strategies for students. But this again was not only based on what was learned but on personalizing it to the student and classroom situation. But devising these strategies involved negotiations of other sorts.

One available resource that both teachers stressed on using in the classroom was assistive technology, including programs such as Kurzweil or having available AlphaSmarts was both welcomed but a source of frustration for teachers. Mrs. C remarked on their training for such initiatives: “We’ve had some in-services around this inclusion and the assistive technology for the project we are working on.” However, during this study, the researcher became the technology expert, as both teachers still did not have a grasp on what the technology could do, nor have the ability to trouble shoot technical problems. The researcher was utilized a number of times as there was no technical help available from the board. Mrs M. also remarked that “we have the AlphaSmart computers which help with students who have more of a motor problem, where writing, physical writing is difficult. They’re helpful. They also help kids to focus. But for resources that is all we have.” One of the common initiatives in having an inclusive classroom is the implementation of technology but these sorts of strategies require technical and knowledge-

based resources that teachers sometimes did not have, and with that teachers relied on the researcher for more help, negotiating this relationship to provide for the demands they had.

This does not deny the fact that teachers had training or professional development. Teachers had gone to some lengths to obtain extra training in strategizing for students using this technology in some cases. When they were questioned during the interview, the teachers stressed their credentials in having Special Education and Reading Development as extra professional development and qualification courses, on top of their basic teacher education training. Interestingly, they stressed the works of prominent language specialists and both had their respective basic training course in special education. One teacher mentioned that she sought out workshops and asked to attend these workshops:

When I started back into full-time teaching as a supply teacher, I went to every workshop I heard about and I would go to the coordinators: the French coordinator, the English coordinator, I didn't care who it was, and I said can I come to that workshop even though I am not a classroom teacher for you. So I was very adamant about finding courses to update my learning and my ability to teach, like to find new strategies. (Mrs. C)

In her determination to become more educated, this teacher gained valuable strategies in teaching students of varying needs; however, she felt she had to seek out these workshops and courses out and not all were made available to her; thus, she negotiated this based on the relationships she had with her administrator and other teachers. Numerous times in the data, there was a lack of educational development available to both the teachers and educational assistants about inclusion strategies and it seem to be the responsibility of the teachers to seek these out. It was not always clear in these interviews, however, that their training and workshops had provided the teachers with many concrete strategies they could use in managing the integrated classroom.

As a result, management and resources were a chronic problem, and both classroom teachers in their interviews reiterated that lack of hands in the classroom was a problem. One teacher stated:

When there are not enough hands in the classroom, when you don't have an EA... for example, this class is 40 percent identified kids and because of that if you don't have an EA present, it means that we cannot hit every kid all the time the way, you know that we would want to do. Like you know what you want to do, but you are only one person. (Mrs. M)

Ideally for a child who has a severe challenge it would be really nice for them to have an EA so that they can get the one on one help that they need on a regular basis. Unfortunately, within our school that's not an option. We have, there is no EA for instance in my classroom, and I have 9 students who are identified with learning disabilities, so in my case, it's a matter of getting whatever volunteers you can. (Mrs.C)

One of the main resources that teachers drew from was the human resources at their disposal. Numerous times, the researcher was asked by Mrs. C. and others to help manage the class while another lesson was taking place or to take groups of children out for direct instruction. If the researcher was not called on, either of the teachers would utilize the ECE

students or parents who would volunteer. In some cases, parents would also volunteer at lunch and recess periods to provide a break for teachers from the classroom. Parents would often also come in and read with various groups of children or help out with assignments, science, and art projects or take children to the library for book exchanges; these relationships became crucial for the teachers because they provided aid in the classroom. Lastly, the teachers and the principal would provide direct reading lessons and review for EQAO (Education Quality Accountability Office) testing, the standardized testing which occurred at this grade level. This further supports the idea that teachers need more training on inclusion and further help in the classroom. It also exemplifies how various educational actors and community members are involved in implementing inclusion by establishing relationships with one another and the students, and by communicating and negotiating those relationships to ensure that students' needs are met regularly. Lastly, it shows that providing policy or rhetoric is not enough to teachers but acknowledging that there are a variety of means by which inclusion is to be implemented not just by teaching alone.

Practising inclusion for these teachers requires one-on-one interaction with the students, and in a class of 25, this appears to be virtually impossible. The situation was eased in this class, as the teachers had the full support of parents from the community who would volunteer to come in and help in the editing of assignments and major projects. It was these volunteer relationships and established parental communication that seem to benefit them the most. Overall, though, teachers had only a limited number of strategies for dealing with children with disabilities, and they were not able to implement many of the strategies they did have (e.g., giving students extra attention) as well as they would like, because they did not have the resources available to them.

The situation placed a great deal of stress on the teachers as well as the students. On numerous occasions the researcher remarked feeling frustrated in dealing with all the demands that students placed on her:

The classroom teacher during the whole day kept on saying how she valued another pair of hands and help in the classroom. The children constantly kept her on her toes and I could not provide the one on one attention the kids with special needs required. The teacher constantly kept her eyes on the whole group and selectively ignored those students who prayed for her attention in order to meet the needs of some learners. (Observation)

This stress should come as no surprise as it has been shown that the working conditions of teachers is often mitigated by the various policy pressures and demands of their own classrooms combined (Bascia & Rottman, 2011). How teachers perform under certain pressures as this “depends on how teachers perceive and respond to their working conditions” (Bascia & Rottman, 2011, p. 792) and that factors such as believing that teachers can respond to the social, academic, and emotional needs of their students is of great importance (Bascia & Rottman, 2011).

### **Conclusion**

This study aimed at answering four key research questions: how do various participants in the classroom and school view inclusion? How are teachers practicing inclusion? What are the frustrations and consequences of such implementation on the classroom as a whole? And how do

concepts of loose coupling and inhabited institutions help understand the logic of classroom practice? To address the first two research questions a combination of methods was used and yielded insightful but unsurprising results: mainly that teachers and other educational actors involved in the classroom viewed inclusion as slightly different from one another; these responses ranged from including all children in the classroom to ensuring all learning needs are met. This study was unable to answer how children viewed inclusion, which would be beneficial in future research, especially within a Canadian, and more specifically, an Ontario context.

The concept of loose coupling provided a useful theoretical framework for understanding how a policy such as inclusion was implemented but only with the creativity, flexibility, and often negotiation, a process captured by inhabited institution research. The classroom teachers in this study often communicated on an informal basis but also relied on established relationships with volunteers, ECE students, the EA, and parents to truly help each child with various learning needs. At some points my help was sought as a participant observer, which provided me with valuable insight into the negotiation process and establishing links of informality with other teachers and administrators. Gamoran and Dreeban (1986) highlight that teachers' strategies in implementation of any policy can be restricted by the number of resources available; this in-depth case study exemplified this well by illustrating how lack of resources dictated policy implementation and negotiation. And just as Coburn (2004) found, teachers drew upon their past experiences and knowledge they had acquired in their training and in their own creativity; and one of the most common ways teachers responded to the policy was to accommodate, something which Coburn (2004) states is consistently used by teachers in the face of policy implementation. Teachers in this study also embraced inclusion but often stated there were numerous frustrations and could not always find the pedagogical strategies to fit with its mission, which is something that echoed in Coburn's (2004) work as well.

So while inclusion presents an ideal policy for present day needs, it seems that it is characterized by a loose coupling with teacher strategies. This is not uncommon as Deal and Celotti (1980) find with education stating that "instructional policies and educational priorities show to the world that there is some consistency within the institution" (p.473) but consistency is only at face value. What seems to be at the root of the problem is what Labaree (2010) characterizes as the inability of rhetoric or policy to reach the core of the classroom interactions; instead, teachers negotiate this policy through a number of different ways and through a number of different relationships which occupy the classroom and school environment (Hallett & Ventresca, 2006a). This negotiation often took place "on the fly" by the teachers or myself and left us to interpret what was meant by policy and how to implement the policy in the face of classroom reality. This negotiation of policy was dependent on a multitude of factors such as past experiences, demands of the student behaviour, established strategies set out in training, and physical and human resources. Meanings of inclusion were in a sense directly tied to not only the teachers' abilities to be organized and managed in the classroom but also the perceived relationships with other resources like the ECE students, the EA, parents, myself, and the principal.

More research is needed to establish just how pervasive this case study's findings are in other schools. Despite its important contributions in providing in-depth understandings of classroom interactions and negotiations of inclusion policy, it is limited in its applicability and generalizability because of the small sample size. It would be interesting to see how other qualitative studies characterize teachers' strategies, meanings, and negotiations within the

inhabited institutions framework. This study was also unable to assess how administrator attitudes might also affect these negotiations and policy implementation, a crucial aspect that has already been cited in research (see Praisner, 2003). However, in the face of such weaknesses, this study does make two contributions to research: it adds to the abundance of literature on loose coupling but provides a more qualitative understanding of this process, and secondly, it applies the idea of inhabited institutions in explaining teacher meaning making and negotiation of policy through institutional and personal relationships.

These two concepts of loose coupling and inhabited institutions can provide for much more insight in the educational realm and may lend to more practical strategies but also help to acknowledge both the dilemmas facing administrators and teachers in policy development and implementation. And while both of these concepts have been well researched within the areas of sociology of education, and organizational and professional relationships, they are sorely missing from educational research where policies are pervasive and the consequences of such are even more profound and concrete. Thus, acknowledging these two concepts, even in such a small case study, lends to a new line of understanding and research within education.



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