Inclusive, safe and caring schools: Connecting factors

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Inclusion of students with special education needs into regular classrooms, and prevention of violence in schools are two important social or public policies with which school administrators and teachers are faced in today's public education system. If school staffs are to be effective at implementing these two public policies, it seems reasonable to explore how these policies are successfully implemented and connected. Much research is independently known about inclusive education or violence prevention in schools. However, to date, no one has explicitly studied the policy connections or implementation efforts that result in schools becoming both inclusive of students with special needs and safe for all students. Identification of the connecting factors between policies on inclusive education and safe schools was explored in this study. Using a case study approach, four schools were purposely selected and school staff members were interviewed. Data from interviews, observations and relevant policy documents were analyzed using the constant comparative analysis inherent in grounded theory methodology. The factors that connected inclusive schools and safe schools are presented.

Introduction

Terms such as *inclusion, integration* and *mainstreaming* are often used to mean the same thing. However, the terminology appears to have evolved to describe the progressive level of inclusion of students with disabilities in general education classrooms. In the early 1980s, "mainstreaming" was a widely accepted term and was used in the literature only in reference to students with mild disabilities. This suggests that students with a disability had to fit into the regular classroom with little accommodation for the student's needs (McLeskey, 2007). The term "integration" was more associated with closing separate schools for students with severe disabilities and relocating classes for

these students on regular school campuses and in neighbourhood schools. The term "inclusion" emerged in the 1990s by advocates to more accurately communicate their claim that all children, including the severely disabled, needed to be included in the educational and social life of their neighbourhood school and classrooms.

Much research has been conducted on inclusive education. To date, most of the recommendations encourage further research and development of the knowledge and understanding underlying inclusive education (Davis, 2002). No single agreed-upon definition, legal or theoretical, of inclusive education exists. The use of the term in research and in the work of professionals has led to much confusion and division in the field and therefore many interpretations of exactly what inclusion means in practice (McLeskey, 2007). Inclusion is more than the simple placement of students with special educational needs into regular classrooms. Inclusion is concerned with overcoming barriers to the full participation of all students in the culture, curricula and community (Ainscow, 1991). Inclusive education is primarily based on the values and beliefs that students with special educational needs belong and have a right to participate fully in regular classrooms. It requires instructional improvement and increased organizational capacity of school staffs to accommodate diverse learning needs of all students.

Since 1992, teachers in the Province of Alberta have publicly and passionately voiced concerns on a number of issues, including their frustrations with student conduct and the integration of students with special needs without support or services. A highly publicized report of the Alberta Teachers' Association (1992), *Trying To Teach: Necessary Conditions,* followed by similar stakeholder reports (Alberta Teachers' Association, 1997; Alberta School Boards Association, 1997), found that teachers supported the inclusion of students with special needs but were frustrated in its implementation. Teachers' most pressing concerns were trying to teach students with special needs or behaviour difficulties in regular classrooms without sufficient notice or information, teacher training, and classroom support. Yet many school districts moved to include more and more students with special educational needs into regular classrooms. An ongoing challenge for inclusive classrooms is

meeting the instructional needs of all learners; especially when content is challenging and when student needs are increasingly diverse (Mastropieri, et.al., 2006).

The terms *safe schools* and *school violence* were also used to search the literature. The lack of consistent terminology and concise definition made it difficult to establish a clear picture of what constitutes a safe school. To develop a broader understanding of what constitutes a safe school, definitions of violence in general are used to illustrate what violence in schools looks like. It is important to distinguish between *school* as a physical location for violence that has its roots in the community and *school* as a system that causes or exacerbates problems that students experience.

The World Health Organization (WHO) (2002) defined violence as "the intentional use of physical force or power, threatened or actual, against oneself or another person, or against a group or community that results in or has a high likelihood of resulting in injury, death, psychological harm, maldevelopment or deprivation" (p. 5). The concept of intention is a key element in this definition. Another important concept is the use of power. Violent acts may also include threats and intimidation as well as the use of physical force. Bullying is an example of threat and intimidation, and it thrives when it silences the victim and develops apathy in the observers.

As children move through adolescence and schooling, aggression has been reported to take on different manifestations and functions. For example, girls seem to specialize in a covert form of social hostility called relational aggression, which involves trying to harm another person's social relationships or reputation (Lawson, 2005). Hitting, pushing, isolating a person on purpose, and name-calling are examples of aggressive behaviors. Bullying is considered a subset of aggression as the bully commits aggressive behaviors repeatedly and intentionally, and it is most likely to occur in social situations when peers are present. Aggressive behaviors aimed at intimidating another person psychologically; discrimination or disregard for differences; and lack of appropriate systems for channeling anger, frustration, and conflict are

considered forms of violence (Camargo-Abello, 1997). A poor school climate, negative teacher-student relations, and unclear or inconsistent enforcement of rules are associated with increased youth violence in schools (Council of Europe, 2003). Bullying has been found to be common in schools. Ten to 15 percent of students admit to being involved in weekly physical bullying, either as bullies, victims, or victim-bullies (Olweus, 1991; 1993). Roughly 10 to 15% of students report involvement in weekly verbal bullying (Solberg & Olweus, 2003). One Canadian study on the nature and extent of bullying in schools, found 41% of students who reported that they were victims or bullies monthly. Seven percent said that they were victimized weekly, and two percent reported that they bullied other students socially every week (Totten, Quigley, & Morgan, 2004). Bullying has been recognized as a widespread, persistent, and serious problem in our schools (Olweus, 1991; Pepler, Craig, Zielger, & Charach, 1993; Totten, Quigley, & Morgan, 2004).

Task forces and provincial surveys have indicated that bullying and harassment are major concerns in public schools (e.g., Alberta Education, 1994; Alberta School Boards Association, 1994; MacDonald, 1995; Malicky, Shapiro, & Mazurek, 1999). A common response of some schools to any form of violence has been to "get-tough," which often results in a rise in student expulsions and assertions of zero-tolerance for any misbehaviour. MacDonald (1996) argued that get-tough practices increase problems and lead to more violence because it results in adults trying to exert control over students rather than empowering students to control themselves. If the purpose of the education system is to foster and maintain respectful, responsible behaviours in students, teachers need help to develop such character traits.

Teachers support inclusive, safe and caring schools but need more support (Alberta Teachers' Association, 1997; Alberta School Boards Association, 1997). This research study is significant as teachers are obligated by provincial policies to include students with special needs into regular classrooms and ensure each student is provided a safe and caring school environment. If teachers agree with these policies yet experience frustration in their implementation, the issue of how best to

support teachers has to be studied. The connecting factors should be identified to better support teachers.

All public schools in Alberta operate under the same policies, including those specific to a school board's responsibilities on the placement of students with special needs in regular classrooms and ensuring that each student is provided a safe and caring school environment. Schools, in providing education services with government funding, must carry out government policy. Through the responsibility delegated to school boards by the government, school boards have considerable discretion and flexibility in the implementation of policies. In the Province of Alberta, Canada, every school must ensure that students with special educational needs are placed into regular classrooms in neighbourhood schools and provided a safe and caring school environment. In other words, public schools are agents of the government and have to take positive steps to accommodate the special education needs of students and prevent bullying and harassment. Policies specific to educating students with special needs and ensuring safe and caring schools are implemented within individual schools and by local school boards. Given the multiple policy directives for public schools, there is a crowded agenda for multiple policies to be implemented. If a policy on inclusive education or school safety is to sit at the heart of other policy initiatives, such a policy may become marginalized (Ainscow, 1991). Progress is then determined by the determination of key individuals at the school, or district level, and progress may be patchy. Ainscow (1991) argued that "while the existence of a clear policy statement is seen to be imperative, its mere existence offers no guarantee of change" (p. 198). A well designed policy that is well implemented is, by definition, a success (Pal, 2005).

Central Research Focus

Creating inclusive, safe and caring schools presents a real challenge. Without a consensus on what constitutes an inclusive school or a safe school, the challenge is to create a clearer definition that teachers can envision and achieve. Without clear procedures on how to translate policy into practice, the challenge is to determine what supports teachers

really need to be successful. The goal of inclusive, safe and caring schools should be the achievement of consistently better student outcomes for all students (MacKay, 2006).

This study explored the following broad questions: If a school provides an inclusive education, what factors contributed to its inclusiveness? If a school provides a safe and caring environment, what factors contributed to its safety and caring? Do the factors that resulted in an inclusive school connect with the factors that resulted in a safe and caring school? If school staffs were successful in implementing these two public policies, what factors contributed to their success? This study is significant because, to date, no research study was found to explicitly connect inclusive schools with safe schools and the effectiveness of school-based implementation of policy. The central research focus of this study is on what staffs in public schools say and do that results in their successful implementation of two provincial policies, namely, inclusive education and safe schools. This study is of practical relevance to school staffs who are confronted daily by student diversity, school safety needs, and within a host of other provincially mandated policies.

This study is also significant because it explores how government policy is implemented at the school level. To better understand policy implementation, it is important to examine the contexts within which it is done (Honig, 2007). The factors that supported educational policy implementation are identified by what school staff said and did in each school studied. How policy was actualized through implementation by school staff identifies the activities that gave the policy effect. Four schools were studied as policy implementation sites. Practices and supports are identified by school staff based on their experiences and how they made sense of each policy's intent.

Methodology

The connecting policy factors between an inclusive school and a safe school were not clear in the literature, so the design of this research began with the need to identify these similarities. The primary purpose of this study was to identify the factors that connected the successful

implementation of two policies. This necessitated a comparative case study approach. Using a case study as the basis of this qualitative research, this study examined exemplary cases, or schools, in order to identify the factors that resulted in public schools being both inclusive and safe and caring. Schools, as a case study, can describe the real-life context in which policy implementation occurs. The selection criteria included schools with: three or more years experience with inclusive education or safe and caring school initiative; staff knowledge of the school's change process; agreement to participate in this study; administrative support; and nomination by school superintendent or expert with the opinion that the school staffs were successful in meeting the diverse needs of all students. Four elementary schools were selected as exemplars of success with inclusive education or as a safe and caring school. The four elementary schools were located in different communities. Two schools were examined to observe what staffs in local schools said and did that resulted in their success in fully including students with special educational needs in regular classrooms. Two other schools were examined to observed what staffs said and did that resulted in their success in providing a safe and caring school for all students. Each school operated under the same provincial policies and was equally challenged by adequacy of resources and funding provided to public schools in Alberta. The schools were then compared with each other.

Staff were interviewed and observed in classrooms. Policy documents were examined. The data are analyzed, interpreted and discussed in relation to what each staff member said and did to make their school inclusive or safe for all students. Interviews were used as the primary strategy for data collection and in conjunction with observations and relevant policy document analysis. The interviews used open-ended questions in a semi-structured format and provided for individual variations (Hoepfl, 1997). In-depth interviews were conducted with 36 individuals who volunteered to share their experiences and successes with inclusive education and a safe and caring environment. Observations of participants in the context of a natural setting, the school or classroom environment, were also analyzed. Teachers were observed teaching in classrooms that fully included students with special needs.

Staff meetings, one case conference and a staff committee meeting were also observed and documented for analysis.

Data Analysis

Bogdan and Biklen (1982) explain qualitative data analysis as "working with the data, organizing it, breaking it into manageable units, synthesizing it, searching for patterns, discovering what is important and what is to be learned" (p. 145). It was important to seek illumination or an understanding so that extrapolation might be applied to similar situations in other schools. The challenge was to place the raw data from 36 interviews into logical, meaningful categories; analyze them holistically; and then find a way to connect the categories to each other. Grounded theory methodology was therefore used to analyze the data gathered in this case study. To ground the theory meant that this research was based on the actual statements and concrete realities of people as they live through their experiences (Boyd, 1990). According to Stern (1980), there are two main uses for grounded theory, in investigations of uncharted waters or to gain a fresh perspective in familiar situations. This study investigated a new area that had not been explicitly studied before. This study also delved into new territory as the policy factors that connect inclusive with safe schools had yet to be studied or identified. The actions, beliefs, and experiences of school staffs using inclusive education and safe and caring pedagogies, represented the staffs' conceptions through their own explanations and the observations of staff in action.

Strauss and Corbin (1990) describe the general method for developing theory, which is the constant comparative method, as involving the examination and reexamination of the data to discover inherent themes. To generate theory, conceptual categories need to be generated, properties described, and interrelationships discovered among them. Data were analyzed in three stages: open coding, axial coding, and selective coding. The basic defining rule for the constant comparative method is, while coding each response or statement, to compare each response with all other interview responses. The data were further examined and reviewed based on the intent of each word or phrase, and

the meaning of each response provided in each of the interviews, within the context in which it was provided or obtained. Words, thoughts, or actions were highlighted in order to code those that were descriptive of the research question and captured the essence of each person's response. This process sensitized the researcher to certain words or phrases like "we are role models" and "we have to work together," that later were compared as two separate phenomena because they were interpreted one to be a product and the other a process inherent in the practices. In order to bring a conceptual order to these meanings and descriptions, codes were used. Each code represented a more abstract term for similar words or phrases. This process helped to capture descriptive codes from the data such as an event, feeling or behaviour. The goal during this stage was to ensure all concepts were captured in order to develop descriptive categories and their properties, which formed a preliminary framework for the second stage of coding. Words, phrases or events that appeared similar became a category. Categories consisted of groups of similar concepts. The categories were to be gradually modified, refined, or deleted during subsequent stages of the analysis (Hoepfl, 1997).

This next stage involved a reexamination of the all the categories identified to determine how they were linked, a process called axial coding (Strauss & Corbin, 1990). Strauss and Corbin (1990) define axial coding as clustering open codes around specific axes or points of intersection. Sets of codes were developed and labeled if they were similar or connected to a pattern. During this process of axial coding, deeper connections were made between the similarities of the two types of schools. This step took the categories beyond the description to an abstract level of meaning. In tracing each open code backward, the codes were then compared to identify common features, which helped to refine and cluster them into fewer categories. To facilitate this process, the categories and the broader concepts were grouped together according to the significance within the respective research question. These categories and their properties were important as they established the initial links between the data and the theory.

The connecting factors or themes were identified as:

- Commitment: decision-making, goal statements, school improvement, expectations;
- Common vision: consistency, consensus, school vision or goal, consistent practices;
- Collaboration: teamwork, relationships, shared knowledge, problem-solving;
- Capacity: knowledge, skills, pedagogical (adapting, differentiating instruction, effective behaviour support systems);
- Culture: shared values, trust, beliefs (equality, acceptance);
- Ownership: motivation, self-reflection, autonomy.

This analytic process grounded the data because it arrived at a theory of how school staffs provide inclusive and safe and caring school environments. For example, the majority of the interview responses began with either "I" or "We" followed by an explanation of some sort. Subsequent analysis resulted in these two being assimilated into the broader concept of "motivation," which was then further abstracted to become "ownership." The properties related to the core concept of ownership were found to be, among others, a result of increased capacity in knowledge and skills, being committed to the school's vision, collaboration with colleagues and commitment.

The Core Variable

From the process of constantly comparing the data and developing theoretical sensitivity to the factors that bridged policies to successful inclusion of students with special needs and ensured a safe and caring environment for all students, the central or core variable was where

> *In schools that were successful in providing an inclusive, safe and caring environment, school staffs "own" the policy implementation process and organize themselves accordingly.*

The properties of the core variable were tested against the supporting themes. Strauss and Corbin (1990) provided the specific structure to be

as follows: a causal condition leads to the phenomenon which leads to the context, which leads to action strategies which then lead to consequences (p. 124 – 125). Following this structure validated the relationships among the themes. The causal conditions (school improvement, goal statements) lead to the phenomenon (common vision), which leads to the context (including all students, improving student behaviour), which leads to action strategies (collaboration, building capacity to differentiate instruction and implement behaviour support system), which leads to consequences (shared values, acceptance, respect, motivation and confidence, and finally, ownership for the process). This theory was tested against the interview dataset, the responses provided within each context, and this verified the substantive theory. The core variable of ownership was best illustrated by the following response from an administrator: "We had the staff involved in the decision making. Teachers were an active and regular part of the process. In this way, they developed ownership and bought into what is needed to be accomplished for our students. Teachers needed to be heard and then we acted on that."

Results

The four schools studied had a reputation for providing quality programs, doing the right thing in the right way and better than most schools. The schools provided evidence that educators can make a sustainable difference despite the challenges of sufficient resources or additional funding. Of the four schools studied, one was challenged by declining student enrollment; an increasing number of students needing individualized programming and behavior support; decreasing class sizes; training teacher assistants to assist with implementing individualized programs; responding to increased student diversity and competing with local alternatives to public schooling (e.g., religious education and private schools). The second school was challenged by declining enrollment, insufficient funding to support all students, including students with special needs, and lack of resources as a small rural school. The third school was challenged by reduced enrollment, large class sizes, anger from a recent labor disruption with subsequent staff cuts, and poor student behaviors. Finally, the fourth school was

challenged by pending budget cuts and providing an inclusive program for a student with severe behaviour disorders.

These four schools had the same responsibilities expected of all elementary schools in Alberta. These responsibilities, in addition to increasing student achievement, included reducing class sizes, implementing a second language starting in Grade 4, conducting daily physical activities, using technology, and implementing the new curriculum in social studies. Each school merged its individual school goals with the district and provincial goals, which were to provide: quality learning opportunities; excellence in learner achievement; lifelong learning, world of work, and citizenship; effective working relationships with partners; and a highly responsible and responsive jurisdiction.

Connecting Factors

Staffs in each school exhibited remarkable levels of caring, a laser-like focus on their mission and a dedication to collaborative decision-making. Another characteristic that all schools shared was that the move to an inclusive or safe school was understood as a process that required everyone to be "on board" with their support. More importantly the change process was not necessarily a re-organization of the school's structures, but of the processes by which staff continually reflected on their successes and reoriented themselves in a more coherent direction. The factors that connected inclusive schools with safe and caring schools are discussed further in the following section.

Common Vision

The single most frequent response from the four staff groups was a focus on all staff working together to achieve the school's mission, which included supporting every student. A safe feeling and students being included in all activities were often mentioned as the teachers' definition of an inclusive or safe and caring school. Responses that defined an inclusive or safe school included specific actions such as "A school that is positive, works together, shares ideas as well as welcoming new ideas or

input from students, parents, administration and teachers, everyone is involved," or outcomes such as "A place where other kids matter, everyone is treated with dignity and respect. Kids feel free to express their concerns and know they will get help when they need it." The vision also included a sense of setting priorities to accomplish as reflected by one school principal, "[We] integrated [students with] special needs into regular class and then worked on teaching students about safe and caring schools."

In each school studied, staffs' consistent philosophy or mission created a sense of purpose for them. In other words, philosophy mattered. The beliefs and values created a sense of what was worth teaching and how it should be taught. Enabling staff to be more articulate about their views and philosophical judgments is a crucial first step in forming effective learning communities (Ferrero, 2005). A mission statement provides a statement of purpose (i.e., what is to be accomplished), the method of accomplishment (i.e., the activities), and the principles behind the purpose and method. A vision statement provides an image of what success looks like (Morrison, Furlong, D'Incau, & Morrison, 2004). Collins (2001) studied 11 companies that sustained "good to great" results and concluded that a single organizing idea, a basic principle, or concept unified everything that staff did. Transforming personal visions and individual thinking into a group vision is the challenge.

Commitment

The four staffs demonstrated a genuine commitment to promoting equality, holding high expectations, and working together for the greater benefit of all students. These commitments were also the outcomes of their efforts. Teacher statements such as, "When you come in our school you shouldn't be able to define special education or distinguish differences. Everyone is working together to feel a safe and cared for atmosphere, and everyone is accepted for who they are" and "our school is a place everyone is treated with dignity and respect." Staff needed to be committed to being consistent with agreed upon practices.

Commitment was the precursor to developing ownership. "We had staff involved in the decision-making, that way they have ownership by buying into what needed to be done" stated one principal. When staff were committed, they were better prepared for the challenges, and could weather the storms in a healthier and more productive manner. "Being in an inclusive school is not easy, it is a challenge. If you want to do it well you need to be ready for the ups and downs," commented one teacher on the supports needed to be successful. Another teacher commented that support from colleagues was important to being successful, "Any programs we have introduced together have made it more positive."

There were many positive outcomes or success indicators reported by staff that served to illustrate the level of commitment made over time. The most important outcomes frequently mentioned by staff were not higher achievement on tests scores but something greater and more internally rewarding. Frequently, staff commented on the positive changes in the school and the improved behavior of students. My interpretations of staff responses indicated a great sense of staffs' self-efficacy. The two major indicators of successes frequently identified by staff were related to increased happiness and positive values such as increased student respect and acceptance. What constituted this "happiness" could not be accurately determined. No one knows what happiness is (Gilbert, 2006). In helping to explain this concept of "happiness," Csikszentmihalyi's (2004) definition provided the most concise explanation. "Happiness is the ultimate goal of existence, the summum bonum or the good chief, in that while we desire other goods, we want happiness for its own sake" (p. 18). Staff comments on indicators of their success included, "I feel good internally," "Teachers are smiling," "It's seeing the fruits of your labor," "You see it in the children's eyes, their smile and when they walk down the hallway," and "when parents are thanking you." Student happiness engendered staff happiness, and the combination produced a tremendous feeling of satisfaction in each school. Happiness did not come from wanting to be happy. It came from working toward a goal greater than oneself. If inclusive education is accepted as "the unconditional commitment to integration, based firmly in principles of and concern for equality and

parity of treatment for all students" (Fulcher, 1989, p.51), then it could be argued that the experiences of the staffs in the two inclusive schools achieved such a goal. Gilbert (2006) refers to this type of happiness as "moral happiness" (p. 33). Comments by staffs reflected their experiences in response to their change in practices. Staff comments also reflected a source of personal joy or sense of success, hence the concept of happiness.

A second outcome was a focus on the positive values of acceptance, equality, and respect for all students. This focus provided students more than simple access to a regular classroom or a consistent discipline system. Inclusive and safe schools studied provided environments where students belonged, where all students were included in learning, and where tolerance and respect were fostered. This outcome was achieved because teachers became more responsive to the needs of all students, developed the pedagogical capacity, and were provided with additional support to differentiate instruction and implement a more effective behavior support system. Student achievement and improved behavior were evident in the annual results reported in each school's education plan. Staff found that, when teachers took the time to learn how to teach all students, this had a stronger effect on academic achievement. Another outcome was the caring relationships established between students and staff. These relationships allowed students to experience a greater sense of belonging and acceptance. It also made it easier for students to talk about safety concerns and for staff to engage in conflict resolution with students.

Collaboration

Supports most frequently cited by staff to be successful included time for teachers to meet, share ideas, and consult with additional service providers. Teamwork was an important factor, which included involvement in decision-making and time to meet. Responses to what supports are needed included: "Being in an inclusive school is not easy, it is a challenge. If you want to do it well you need to be ready for the ups and downs." It was important for staff to help each other and also take advantage of the help that is available to them. "You have to work

in groups and work with the help available. In time you learn how to get it done." "You have to collaboratively believe and have a reason for choosing the supports you need."

Collaboration is characterized by mutual decision making to resolve problems of practice (Kruse, 1999). Often the words *collaborate* and *cooperate* are used interchangeably, but they are conceptually different. Cooperation is the most basic level of social and intellectual interaction among teachers. It does not require that teachers have a shared set of values or a common belief system (Kruse, 1999). All staff members interviewed consistently identified collaboration and teamwork as a key to their success in practice and as an important source of additional support. Staff comments included, "If you want an inclusive school you need to have support from others," "support from your colleagues," "we share our expertise with others," "we have monthly committee meetings," "everyone works collaboratively," and "we work together, share ideas as well as welcoming new ideas." The frequent use of the pronoun "we" was significant as it conveyed philosophical cohesion. In analyzing the practices of the teachers, I concluded that ordinary teachers working together provided the best starting point for collaboration. Time to work together was a valuable resource in the four schools studied.

Schools were organized into "professional learning communities" and time for staff to work together was typically structured into the weekly timetable for staff. A professional learning community is exactly what the name implies: communities where diverse people have a shared commitment to a common purpose, to each other in pursuing that purpose; and diverse views on the collective decision-making process. The learning community is professional in how the members value difference, disagreement, and debate about the best way to identify and implement improvements and in how to promote and bring together data, knowledge, and intuition (Hargreaves & Fink, 2006). The benefits for staff in this study included becoming empowered through collaborative decision-making, shared ownership of problems, exchange of skills, and generation of local solutions. Collaborative teams enhanced teachers' skills for educating a diverse student body and holding high

expectations for appropriate behaviors. Staff in the schools studied expected improvements in students' academic skills and behaviour.

Staff took responsibility for their own professional development and learned new skills and ideas from each other. When given the opportunity to collaborate, much of the expertise needed was available among staff. Collaborative practices provided teachers with an important and powerful strategy for developing an inclusive and safe school. Ainscow's (1999) experience with successful inclusion projects revealed that teachers frequently know more than they use. Perhaps we need to think less about bringing in outside experts and focus more on finding ways to make better use of collective knowledge. The task of administrators becomes one of ensuring that teachers have regular collaborative planning times and that these become central to the day-to-day work.

Capacity

How the curriculum was implemented was an important aspect of the inclusive schools. The effectiveness of the discipline system was also an important aspect of the safe and caring schools. The curriculum and discipline system both required changes by staff. Staff in each school had to transform their teaching practices to better support the needs of all students. How staff did this was planned systematically. "We had to figure out what students need in order to be successful." "Inclusion was difficult at times. You can get overloaded in the classroom, with a wide diversity of students and the demands of the curriculum."

Staff made incremental adjustments to existing practices and, with increased skills and knowledge, developed their capacity to teach more diverse students and manage more serious behaviors, thus altering their practices. Building staff capacity was an important factor that affected the instructional environments. It really was learning in context, and I believe that it had a paid off because it resulted in higher levels of staff knowledge and skills, greater confidence and better support structures.

Fullan (2005) defined capacity building as the "daily habit of working together" (p. 4) and added that one cannot learn this from a workshop. One learns by doing and getting better at doing. Capacity building involves "developing the collective ability, the dispositions, skills, knowledge, motivation and resources, together to bring about positive change" (p. 4). Capacity implies that a community can act in particular ways and has specific powers to do certain tasks. Chaskin, Brown, Venkatesh, and Vidal (2001) studied community capacity and defined capacity as "the interaction of human capital, organizational resources, and social capital within a given community that can be leveraged to solve collective problems and improve or maintain the well-being of that community (p. 7). The foundation for building capacity is a sense of community, a commitment among its members, the ability to solve problems and access resources. When applied to a school setting, King and Newmann (2000) define school capacity as "teachers' knowledge, skills as well as the strength of the professional community and the coherence of the school program" (p. 577).

Staff met often in each of the schools in addition to what was scheduled as common planning times and staff meetings. Regular meetings were mainly focused on meeting the needs of students or refining pedagogy. Teachers also shared strategies and ideas to help all students feel included, respected and cared for, and taught the students to do the same for each other. Staff were involved in all aspects of the process to achieve their vision and goals: whether to implement the inclusive practices or the behavior support system; whom to involve; when to receive training; what support was needed; and evaluation of the outcomes. These elements are the same as the foundation for preventing school problems (Zins, Elias, Greenberg, & Weissberg, 2000) and for inclusive schools (Ainscow, 1991). Staff required pedagogical support to close the gap between their vision and their current practices. For the schools in this study, the pedagogical support needed was for differentiating instruction or implementing an effective behavior support system. The design and use of pedagogy arose from the teachers' perceptions about what would be most beneficial for their students.

Culture

Culture consists of the shared values and beliefs in an organization and is a complex pattern of norms, attitudes, beliefs, behaviors, values and traditions that are deeply engrained (Barth, 2002). Individual responses to how staff defined their school, their values and recommendations revealed consistent beliefs and values. "We are respectful of every individual regardless of their abilities," "To gain respect we have to give respect," "Personally we do a lot of role modeling," and "what we do is difficult to define because it is a feeling" as well as describing the school as the "place where all kids matter."

Culture refers to the things that people agree on to be true and right. It is the general atmosphere of a school, how people speak to each other and the images and displays throughout the school. A school's culture dictates the "way we do things around here," and the school's culture has more influence on life and learning than does the superintendent (Barth, 2002). A teacher in one of the safe and caring schools stated in response to what her values were that "Working together, being positive, role modeling, showing respect and following the same guidelines makes it easier for everyone."

Changing school cultures for the better is difficult but, as these schools showed, it is not impossible. Every school's culture can work for or against improvement or reform. Unless teachers are involved in changing the culture of the school, the success of future initiatives or policies will be at risk. Culture was developed through capacity building and professional learning communities, both of which were present in the inclusive and safe schools studied. Block (1993) said that changing an organization begins with changing the conversations in it. If people are able to share ideas about issues they see as important, that sharing itself creates a learning culture (Dixon, 2000). Sharing practices is a route to creating collaborative cultures (Fullan, 2001). Collaborative cultures created and sustained inclusive and safe schools.

Ownership

The core variable that connected an inclusive with a safe and caring school was *staff ownership of the process.* Ownership meant that the process belonged to staff, they claimed the process used as their own, or were seen to be responsible for the process. Staff possessed the knowledge and skills to realize their vision of what they wanted their respective schools to become, regardless of who initiated the process. Being a teacher in one of the four schools studied meant that one needed to be able to respond to questions asked about one's beliefs, ideas and suggestions for practice. Ownership emerged from a common vision or purpose and was reflected in consistency and collaborative practices which built professional capacity and resulted in a culture supported by staff behaviours and beliefs. This leads to a more positive learning environment for everybody. It was not a result of a written provincial or district policy.

Ownership was achieved when staff became part of the process and actively participated in decision-making. Adults used no excuse or defense that enabled poor behavior or nonacceptance of some students. Instead, the adults communicated high expectations and equal respect for all students. Staff comments included: "We made a conscious decision to include all students with special needs into all classrooms," "make time to immerse yourself in learning," "I am prepared to do what I have to do," "it is my job, I need to do this," "it is what you believe in and take ownership for," "everyone has ownership in how the school looks and how inviting it is" and, "taking ownership is crucial."

In each of the schools studied, staffs' ability to share expertise and resources created what Peters (2005) called a "unity of purpose" (p. 156). This created an empowerment with responsibility. It resulted in a shift in thinking about the purpose for students with special needs to be in regular classrooms and why it was important for staff to teach respectful behaviours. Such a change in practice began with the belief of staff that something different needed to be done by staff to support all students. Internal commitment to the change process is important (Baird-Wilkerson, 2003). Quinn (1996) categorized the change process as being

either deep or incremental. Quinn argued that deep change requires new ways of thinking. It is major in scope and generally irreversible. Incremental change is the inverse. Change occurred when school staff made a decision, owned the change process, and these were propelled by the school's mission statement. Mezirow (1997) identified the learning process that brings about change in attitudes and beliefs as "transformational learning" (p. 5). This type of learning occurs when adults acquire a coherent body of experiences, concepts, or associations that frames their reference for the future. The analysis of the data in this study suggests that teachers experienced a transformational shift in their perceptions and beliefs about the capabilities of students with disabilities, as they gained more positive experiences while teaching them. This commitment can only be sustained when staff remain committed and being what Lezotte (2005) refers to as "keepers of the culture" (p. 183).

In schools that were successful in providing an inclusive education and a safe and caring environment, school staffs owned the process and organized themselves accordingly. This theory is influenced and sustained by what staff said and did individually and collectively. This theory emerged from the value of a common vision or purpose, was reflected in consistency and collaborative practices which was built upon a commitment that led to developing staffs' capacity and ultimately, ownership of the process. The result was a more positive learning environment for all. Inclusive education and safe school environments were not the direct result of a written provincial or district policy statement.

A Caveat

One caveat was found in this study. It related to the inclusion of a student with severe behavior disorders who presented a danger to other students in the school. In both inclusive schools, staffs expressed concerns and defined the limits to inclusive education. In the responses to defining an inclusive school, staff responses included: "The only boundary that I draw is in regards to student safety." "Inclusion is not at

the expense of anyone getting hurt," and "you have to draw the line on behaviours that hurt."

The staff members in one school were faced with the challenge of finding innovative ways to support one student identified with severe oppositional defiance disorders when the parent demanded placement in a regular classroom. Staff had developed an individualized program plan, brainstormed strategies to support the student and held a number of case conferences with the parent. The student's behaviour escalated over a period of about six months. A teaching assistant was hired to provide support and became so frustrated that she quit. The second teaching assistant was also unsuccessful. After a series of additional intervention plans were attempted, and the services of a behavior specialist maximized, staff concluded that they were no longer able to meet the educational needs of this student in a regular classroom. Staff agreed that they needed to find another more intensive and supportive educational program than the school could provide. This particular student challenged the limits to inclusive education and a safe school.

Behavior that is truly disordered cannot be tolerated without serious risk, either to others in the environment, to the child him- or herself or both (Kauffman, Bantz, & McCullough, 2002). This led me to examine the literature to determine if students with behavior disorders are best supported by inclusive education practices. The literature revealed that this was not the case. Some students' disabilities require distinctive places for instruction if their educational needs are to be met. Kauffman & Hallahan (1995), Kauffman, Lloyd, Baker, and Riedel (1995) and Kauffman, Bantz, and McCullough (2002) have continually argued for separate classes and preservation of the continuum of alternative placements for some students, especially students with severe behavior disorders. The authors contend that students' behavior differences require more intensive instruction than can be provided in a regular classroom. Inclusive educational practices for students with behavior disorders have not had generally positive outcomes. By the time children reach early adolescence, a history of antisocial behavior and rejection by peers and adults has been firmly established. Limiting positive outcomes for students with behavior disorders are unavailable appropriate

support services in schools, lack of collaborative planning among service providers, and lack of coordination of intervention among the youth's home, school, and community environments (Knitzner, 1993). Reasons cited for lack of effective intervention include conceptual biases on part of school personnel, structural disincentives of various agencies that serve children with behavior disorders, disagreements about practices among professionals, and a lack of focus on the instructional needs of these children. Other researchers have concluded that a consistent approach to the management of behaviors is needed.

Discussion

This case study may not necessarily be generalizable or have wider applications to other schools, but there are lessons to be drawn from the major findings. The connecting factors between inclusive and safe schools were similar to findings by many other researchers (Ainscow, 1991, Gottfredson, 1997, Orpinas & Horne, 2006). Gottfredson's study of what works and what does not to prevent violence in North American schools showed that a school culture that was positive, inclusive and accepting of all students was a key component in effective schools. A recommendation of Gottfreson's research included creating and promoting positive values on how to treat others. Civility, caring, and respect needed to be clearly communicated in the school rules and through the behavior expectations of students. Orpinas and Horne (2006) concluded that a reduction in bullying, by itself, does not translate into a healthy and inviting school community. Schools need to increase the positive qualities of the environment in which students learn. Staff needs to provide opportunities for students to learn the social skills that will help them establish both positive relationships with peers and the academic skills needed to succeed in school. It is important to create a culture that supports healthy interactions and problem-solving. Schools that are successful in providing a safe environment are inclusive places where individual differences are celebrated and valued.

The process of what happens to a common vision when it is translated into action becomes the technology of inclusive and safe schools. The process was not found to be a linear one. Staff commitment to the

process was a condition to move to creating more inclusive, safe and caring schools. The technology includes the connecting factors between collaborating, building capacity, establishing a culture, and staff ownership of the process. These are also features or conditions found in other initiatives related to improving or reforming schools.

The schools studied did not make marginal changes to existing arrangements, but changed the basic organization to match their vision and beliefs. This supports the view held by Ainscow (1991) that inclusive schools are about asking fundamental questions about how the schools are organized, the processes used, and reasons why. Ainscow argued that inclusive schools do not arise as a result of school improvement efforts. He argued that research on school improvement is

> *prone to formulating lists of characteristics that offer a deceptively simple technical solution to what are in essence complex social issues … School improvement is a highly complex process requiring sensitivity to the nuances of each school staff and local conditions. (p. 119)*

The literature on school improvement can be a useful starting point but can't be trusted fully. There is no single model for the process of school improvement. Each school has its own idiosyncrasies and must develop its own way forward and drive change from the inside out (Fullan, 1994). Staffs in the four schools studied were most effective because of the close congruence between goals and the mission of the school.

Successful inclusive and safe schools were established when school staff owned the process and were supported throughout. Successful implementation did not depend on one specific program or policy statement, but on the common vision, commitment, collaboration and capacity of staff. This is what Newmann and Wehlage (1995) refer to as "will and skill" (p. 1). The staffs' effectiveness depended on how well the vision and beliefs were connected to the other factors, use of consistent practices and additional supports to develop the professional capacity of staff. This developed the organization's capacity and was a result of staff leadership. An inclusive, safe and caring school was not the result of a

written policy statement. One caveat was found in one of the schools studied that challenged the limits to inclusive education. This suggested that there may need to be a limit to full inclusion and the ability to successfully include all students with severe emotional or behaviour disorders.

An inclusive and safe school is not just one that accommodates student diversity and responds to behaviors. It is about creating a school that is capable of continual improvement. Ultimately, though, creating such schools was a result of successful implementation of policy by school staff at the school level. It was not a result of a written policy statement.

Implications for Practice

Schools that provided an inclusive environment for students with special needs were also safe and caring environments. Once a school staff decided to become more inclusive or safe, this focus was aligned to the school's mission statement. Staff refined their instructional practices and organizational procedures and, subsequently, changed the culture of each school to better respond to the needs of students. In the process of change, staff attitudes became more inclusive as demonstrated in their relationships with students. Their commitment to inclusive and safe schools became based firmly in the principles of, and concern for, equality and acceptance of all students. Schools became more inclusive and safe because staff worked together to develop the knowledge and skills to support their goals. The process was not an act of compliance with policy.

Definitions and expectations need to be aligned to the overall mission or vision of the education system. Defining the vision or direction of efforts addresses where staff are going and what a school should look like. The vision should be clear enough for staff to act and become committed. The practice of improvement is the sharing of a set of proven practices and their collective deployment for a common end (Elmore, 2004). Elmore's (2004) studies on successful school reform efforts concluded that it is important to organize everyone's actions around an instructional focus until practices reach a high standard and staffs internalize the

expectations. The schools studied here improved because the staff agreed on what was worth achieving and set in motion the process by which staff learned how to do what they needed to do in order to achieve their goals. In other words, the "why" staff need to act comes before the "how."

Inclusive and safe schools are a result of a continuous process. These are schools that are constantly improving and are not seen as having achieved the perfect state. In the process, staffs continually analyze barriers to the success for all students. Ainscow (2007) calls this "school improvement with attitude." (p. 129). The development of such schools did not emerge from a mechanical process in which specific organizational practices or particular programs increased success. Staff developed capacity and built consensus based on the responsiveness of the students to the changes. The process of including all students entails reducing the pressures to exclude some students.

Implications for Future Research

Recommendations for future research on inclusive, safe and caring schools are limited to four areas. First, the connecting factors identified from this study should be taken and applied to a school that is not yet fully inclusive or safe. The results of such action research would contribute to verifying the findings. Second, more research is needed on how school staff can increase the participation of all students in the culture, curriculum, and community of schools in order to support the intent and purpose of the respective policies. Inclusive and safe schools must be about what is possible in ordinary circumstances in typical schools, not what is possible with extraordinary resources or exceptional teachers, however important these may be. The restructuring of a school culture, policy and practice are features of the schools studied. This begs the question for further study: When faced with student diversity, what precisely are the cultures, practices and policies that are to be developed in order to maximize the participation of all students in the culture, curriculum and community? The review of the literature related to this study was mixed and inconclusive as different definitions were used.

Third, this study should be extended to examining best practices in secondary schools. This study focused on four elementary schools. Finally, future research should be conducted on the effects of dismantling the typical structures of special education and the current categorization system that classifies students with special needs. This study focused in part on students who were categorized as having special educational needs. This research could be focused on ensuring equal educational opportunities are provided for all students. It makes little sense to foster inclusive and safe schools based on certain categories of students or behaviours. Students who are English language learners or from different cultures need also to be considered. Such research would support staffs' efforts to determine exactly what policies or practices maximize the full participation of all students in the culture, curriculum, and school community. This would be important, especially for those in leadership positions, to find more effective ways to reduce the need for special education placements, reduce disciplinary exclusions of students and openly welcome students and families from differing cultures.

Given the fact that only four elementary schools were included in this study, the findings should not be generalized to all schools. The four schools were chosen for study because they met the criteria that shaped this study. They were purposively selected out of the schools nominated and visited and, therefore, are not representative of all public schools. The relationship between the inclusiveness or safety of a school and the actual achievement of students with special educational needs is unknown. Further research is needed on the outcomes for students, that is, the effect schools' policies and practices have on increasing achievement. This case study was conducted at a certain point in time. Many practices in the schools were in process during the time of data collection which was during the 2004 and 2005 school years. This limits complete duplication of this study. Finally, this study did not provide a comparison with schools that were not inclusive or safe and caring. This limits the study to the similarities, not the differences, between inclusive and safe schools at the elementary level.

Limitations

Each case study is dependent on the nature of the phenomenon studied and the particular circumstances in which it occurs. This study was designed to gather data relative to two substantive areas. The focus was on four schools that had a reputation for being successful in the respective policy under study. Thirty-six staff members, who volunteered, were interviewed. Policy documents, recorded interview data and observation notes were used for data analysis. Staff interviewed included teachers, school administrators, teaching assistants, and a school resource/police officer. The full generalization of the research findings to all public school settings is limited by the case study methodology.

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