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The Special Education Grant: A Parent and Practitioner View of SE2000 Policy

MARGARET CHATFIELD

Abstract:

The Special Education 2000 policy package (SE2000), introduced by the last National Government in 1996 and taken forward by the Coalition Government, makes provision for a Special Education Grant (SEG) to cater for children with moderate Special Education Needs (SEN). The policy is still in the process of being implemented, but questions are being raised as to whether it enables schools to best meet the needs of those students with moderate SEN, when this funding is also being used for those with high ongoing needs who are not eligible for other SE2000 interventions such as the Ongoing Resourcing Scheme (ORS). Conclusions reached in this review suggest that the SEG poses difficulties for school communities in resourcing children with SEN equitably, because the policy allows different interpretations by stakeholders, both with regard to the identification of the target population and the use of the funding obtained.

Policy development endeavours to create a balance between internal and external inconsistencies and concerns itself with power and control and the distribution of values and resources (Codd, 1998, personal communication). But the dissonance between competing forces creates a certain turbulence as people struggle to make sense of new ideas. Indeed, Handy (1994) notes that without a period of turbulence, successful, long-lasting change is unlikely to occur.

Special Education is evolving from just such a state of turbulence, and is one of the fastest growing areas of educational research and development. As both a parent and a teacher in this field I have watched as Special Education has grown from its institutionalised infancy to what I now perceive to be its inclusive adolescence.

As the policy is still being implemented, the Special Education Grant (SEG) poses interesting dilemmas for research analysis. Data are only just coming to hand, and tend to focus on the *use* of the SEG – not on the *outcomes* and *measurable benefits* for students. The assessment and monitoring of the impact of the SEG on the identified population may provide a rich field for future research, with outcomes which can only be guessed at this stage.

Background

A changing world for employment

It is a truism to state that we live in a world which is in the process of accelerating change. Changes include a burgeoning world population, migration, and globalisation of the economy and the substitution since the 1970s of technology for human labour (Paquette, 1998). In New Zealand, a crop of post-war "baby boomers" are creating new fiscal pressures for the aging population, and intensify the need for an increasingly productive workforce. As a result, employers have placed greater demands on educational bodies to produce school leavers with high levels of literacy, skills and knowledge so that they can contribute to the economic growth and competitiveness of their country. These external pressures are reflected in the Ministry of Education (MoE) Briefing for the Incoming Government:

> Our economic success increasingly relies on having a highly skilled, motivated, creative, and adaptive workforce rather than on the commodities we produce and the markets we access.
> (Ministry of Education, 1996a, p. 5)

New Zealand society has been changing from a predominantly rural economy, with a focus on relatively unskilled processing, to a technologically innovative workforce that must compete on the world market. The skills required for picking apples or assembling widgets on the shop floor do not necessarily demand high levels of literacy, numeracy or social competence (Callister, 1990).

Investment in education can have far-reaching social and economic benefits through the development of a bank of human capital, made up of people who become independent learners and self supporting adults. As a recent OECD report says:

> The cost of not investing in human capital can be great. It exposes countries to the risk of entrenched unemployment, greater social

> exclusion, a mismatch of job skills and a loss of economic opportunity. (OECD, 1997, p. 43)

Failure at school, for whatever reason, inevitably leads to poorer employment prospects, greater dependence on the state for welfare, and diminished opportunities to gain the skills necessary to ensure social and economic integration (Education Review Office, 1997; OECD, 1997). In not succeeding, or believing themselves incapable of success, students may also have developed behaviours that stigmatise them even further from the enjoyment of social interaction with their communities.

Those with Special Educational Needs (SEN) are particularly at risk of unemployment and social disjunction because they *may not* have the ability to attain the levels of knowledge and skills required by today's technological work place. These are particular concerns for Maori people and for males, who are both over-represented in special education, unemployment and crime statistics (Ministry of Education, 1991a, 1996c; Te Puni Kokiri, 1998).

A Changing Attitude to Equity and Inclusion

Changes in New Zealand's special education – and in particular the inclusive education movement – have also been driven by the civil rights movement of the '60s, which was commonly linked to issues of desegregation.

Equity in education has since become a central goal in the development of educational policies worldwide (Individuals with Disabilities Education Act, 1975; Salamanca Statement, 1994; Warnock Report, 1978). The aim has been to provide a broad, generalised access *for all* to a reasonably high quality education, and to encourage greater community involvement in education (Irving, 1990). Equitable access by the disabled and other disadvantaged populations, including those with SEN have been the ideal, but not necessarily realised in practice.

It is not within the scope of this paper to give a complete history of the development of Special Education in New Zealand. It is, however, appropriate to give a brief summary of the changes to Special Education which have occurred since the Education Act of 1989.

The Last Ten Years

In the past ten years Special Education has undergone significant growth and change (Davies, 1997; Education Act, 1989). Prior to this

there was a growing public concern about the wide, inconsistent and confusing range of provisions for children who required something different, educationally, from their "normal" peers (Brown, 1997). The radical reforms of Tomorrow's Schools spearheaded a move towards the marketisation of education, with a devolved system of accountability and decision-making (Picot, 1988). Mitchell (1995) notes that these reforms were based on five fundamental principles: equity, quality, efficiency, effectiveness and economy. The demand for participatory governance became part of the school effectiveness movement, in which parents, the new boards of trustees and the community were to become the decision-makers, instead of the centralised and bureaucratic, but now defunct, Department of Education and associated education boards. The learning institutions could now set their own objectives under guidelines established by the new Ministry of Education, within the context of the national curriculum.

By the beginning of 1990, all educational provisions for students with disabilities were fully included in the state education system. Through the process of "mainstreaming", more students with SEN were being enrolled in regular schools where it was appropriate, practicable and desired by parents.

In 1991 the *Statement of Intent for Special Education* (Ministry of Education, 1991b), emphasised the key role of local decision-making about funding, based on the needs of children in a range of educational settings. This approach was endorsed by subsequent research (Mitchell & Ryba, 1994). Schools, communities and parents/caregivers/whanau would now be able to make decisions about the education of children with SEN, within the parameters of specially targeted funding. During 1992/93 a national consultation process was undertaken via the Special Education Policy Implementation team (SEPIT) and the National Advisory Committee on Special Education. While the consultation process of SEPIT could be seen as democratic, it has also been argued (Codd, 1988) that in promoting public discussion, the government considered it had a mandate to proceed with new policy documents which appeared to indicate consent by virtue of participation. The Mitchell and Ryba report (1994) reflected the growing international trend to resource children with SEN according to an educational needs basis.

By 1995, 11,606 SEN students were receiving individual special education discretionary assistance (SEDA) which paid for teacher aide support. Funding was contestable and administered through a

centralised control (the Specialist Education Service, then known as the Special Education Service). But SEDA was rarely considered adequate or equitable, given the increasing number of SEN children with very high and multiple needs entering schools

The new policy, Special Education 2000 (SE2000), was introduced in 1996 with the intention of providing a world-class, inclusive education system which aimed to address inconsistencies in existing provisions for students with SEN. It is this policy which is now being implemented.

What is SE2000?

SE2000 is a complex policy whose aims are to:

- improve educational opportunities and outcomes for children with special education needs in the early childhood and school sectors;
- ensure that there is a clear, consistent and predictable resourcing framework for special education;
- provide equitable resourcing for those with similar needs irrespective of school settings or geographic location.

(Ministry of Education, 1997b)

SE2000 has several components: students with high needs have individually allocated resources through the Ongoing Resourcing Scheme (ORS), Severe Behaviour Initiative, and the Speech Language Initiative. Transitional resourcing is available for students if their ongoing needs are considered to be short-term, or if they are yet to be determined (e.g., 5-7 year olds). Students with moderate needs are resourced through school-based resources – the SEG, and school cluster-based Resource Teachers Learning and Behaviour. Other agencies (e.g., Health) have national contracts to provide sensory, physical and medical resources for students in the moderate to high needs category.

Of these components, only the Ongoing Resourcing Scheme (ORS) and the Special Education Grant (SEG) will be dealt with in this article, as the difficulties faced by those implementing SE2000 are most evident in the articulation between these two particular components.

Qualifying for ORS

To qualify for ORS, the policy requires children to be referred by their school and parents/caregivers, and then verified by a panel employed by the Ministry of Education for this task. Children are verified as

having either *very high* or *high* ongoing needs, and differential funding and teacher time is allocated accordingly. A fund holder administers funding – in many instances this is the Specialist Education Service.

About 13,500 high and very high needs students applied in 1997 for ORS and another 800 applied in 1998. But only 5,900 were successful in being verified for ORS, although some others were able to access other elements of SE2000 (Cassie, 1998). Approximately 6,000 students whom teachers and parents believed did merit targeted funding missed out. Some of these children had a "Priority 1" grading from the Specialist Education Service under previous SEDA funding, indicating *very high* ongoing needs.

The verification trial, as implemented in 1997, was predominantly a paper process, with the verifiers actually sighting few children. Teachers who applied for ORS displayed wide variations in the way in which they justified their choices and interpreted the criteria, which is hardly surprising given the difficulty in defining SEN, and the problematic history of Priority 1 funding under the previous SEDA policy (Fulcher, 1989; Steenlandt, 1998). Many stakeholders were disconcerted when children whom they considered to have high ongoing needs warranting ORS funding were, in the end, not verified, under a Ministry of Education ORS "cap" of only 1% of the school roll (Davies, 1999).

The results of the ORS Verification process so far have shown that:

- the interpretation by stakeholders of what constitutes high and ongoing SEN is inconsistent;
- children that schools and parents consider have high ongoing needs, but who missed out on ORS and any other SE2000 initiative, are now reliant on the SEG;
- appeals are not always meeting with success.

(McAlpine, 1999)

A case in point, brought to my attention, is a child with a disabling genetic syndrome, high ongoing educational needs and previous high resourcing in Australia, who was twice denied ORS verification in the original round of applications in 1997. Two reviews were made and turned down, and no verifier came to see this particular child. Further representations made some transitional resource funding available, which will continue until he reaches the age of 8 years, when another ORS application will be considered. McAlpine's study (1999, p. 11) also found evidence of this type of anomaly.

The SEG and Its Purposes

In the 1996/97 Budget the Government provided $13 million to fund the Special Education Grant (SEG) to all state and state-integrated schools. This grant took effect from the beginning of the 1997 school year, and in 1998 a further $1000 base grant for all schools was introduced, bringing the total SEG allocation up to $29 million. This provided small schools with a greater funding rate per student than larger schools.

> The SEG was based on total school roll numbers and socio-economic status of the schools community. The use of socio-economic status as a factor in the grant was based on evidence from studies conducted in New Zealand and overseas that suggested that students with moderate special educational needs were distributed unevenly across the school population. Children with moderate special educational needs are over represented in schools from lower socio-economic communities. [See Table 1.]
>
> (Ministry of Education, 1998b, p. 3)

Table 1 Special Education Grant (SEG) funding rates

School Decile Ranking	$ per Student Funding Rate
1	51
2	48
3	45
4	42
5	39
6	36
7	33
8	30
9	27
10	24

The establishment of the SEG is based upon three main principles:

- The money has to improve students' learning and behaviour;
- The school community, in the form of the Board of Trustees, must decide how the money is spent;
- Ownership of the process by the school community is essential for the process to work.

(Ministry of Education, 1998b)

The grants are not tagged to specific students, but provide targeted funding to provide support for those with moderate SEN, such as difficulties with learning or behaviour. Nor is it explicitly stated that the SEG may *not* be used for extension programmes for gifted students, but the Ministry admits this may be contentious, and suggests that it is probably "not a valid use of the SEG" (Ministry of Education, 1998b, p. 5). A summary of the SEG analysis, by the Education Review Office, also notes that this is not the intent of SE2000 (Education Review Office, 1998, p. 10).

However, a fundamental premise of the SEG was that the funding was for *all* schools to provide for *all* children with SEN. Some gifted children are no different from other children in experiencing learning and behaviour difficulties. But there is a public perception that because a child is gifted, he or she does not face any of the barriers to learning faced by other children (Minto, 1998). If people see SEG funding going to a group perceived to be already advantaged, they may regard this as inequitable.

Codd (1998, personal communication) argues that those implementing what he calls the "technocratic model of educational policy" have not paid sufficient attention to the societal ethics and values of those supposed to be supporting the policy, and highlights a gap between the initial research base and the perceptions of the policy designers. It can also be argued that resourcing gifted children via the SEG has been an idea poorly sold. New Zealanders tend to regard SEN in terms of disability – not giftedness and talent – even if these same gifted children are experiencing barriers to their learning. The perception of many stakeholders who have complained is that schools which do not have many children falling within the deficit category of SEN are reaping a windfall of SEG funding, which they are then applying to an already privileged group.

It seems that the Ministry of Education needs to address the "tall poppy" ethos in New Zealand for SEG-funded programmes for underachieving gifted children. One answer may lie with the marketing by the Ministry of innovative programmes which have proved to be successful for gifted children who were demonstrating learning and behavioural difficulties prior to SEG funding (see, for example, Gerritson, 1999a). Alternatively, "severely" gifted children could be resourced by other initiatives. A scrutiny of such programmes for positive outcomes could be a useful research exercise.

For some schools there has been a windfall of SEG funding, because the school has identified very few children with SEN requiring remedial support. There is a perception abroad that these schools are then applying the extra funding to an already privileged group (Cassie, 1998; Paquette, 1998). The opposite scenario also exists in schools with high proportions of SEN students, which in effect are experiencing a cut in funding, in comparison with what they received before SE2000. McAlpine's research (1999) also notes high transience of children not on ORS but with high needs. These students "risk being denied funding" and pose challenges for principals in SEG planning.

A small survey conducted by a principal amongst twenty local schools in February 1998 asked the question, "Can your school's SEG cover the cost of providing a satisfactory amount of teacher aide time for the children who have been declined ORS funding?" Twelve out of the twenty schools sampled replied "No" (Nicholas, 1998). While schools are most familiar with the "teacher aide" model, and a high proportion of SEG is spent on them, the extensive use of teacher aides may stigmatise students further and may, in fact, militate *against* inclusion, which is one of the very aims of SE2000. However McAlpine (1999) found that a significant percentage of teachers (49%) believed that a lack of adequate teacher aide help in class had had a negative impact on learning and behaviour for students not on ORS. Research so far indicates that schools are using their SEG grant for a range of interventions (Gerritson, 1999c; Ministry of Education, 1998d, p. 5). However, media reports have revealed that some *parents* were paying for teacher aides to make up the shortfall in funding to what schools had formerly enjoyed under SEDA (Cassie, 1998).

While they may have access to the Transitional Funding for their 5 to 7 year-olds, many principals are very concerned that they will have to wind down their special education programmes to the new lower levels of funding once these children turn 8 years old (Gerritson, 1999b; personal communications, 1998).

Identifying Students for SEG Funding

The Education Review Office found that schools used a number of different methods for identifying students with special needs for SEG support. These included teacher recommendation, standardised test scores, parent identification, self-referral, outside agency referrals and combinations of these methods. As previously noted, those students

with high needs not verified for ORS were an automatic priority for the SEG, once schools had got over the shock of their failure to be verified or become eligible for other SE2000 initiatives.

The Ministry of Education has complicated the situation by "shifting the goal posts" in the identification of the population to be resourced by the SEG. Initial publications stated that the SEG was designed to target children with learning and /or behaviour difficulties *up to and including those with moderate SEN* (Ministry of Education, 1997b). Subsequently, the Ministry of Education stated that the SEG is for students *with moderate education needs* (Ministry of Education, 1998c). Later, in March 1998, the statement was made that students with *high needs who did not qualify for support from the ORS* are likely to be a top priority for schools' use of the SEG (Ministry of Education, 1998b).

The issue of identifying which children have special needs, and to what degree, remains problematic for stakeholders (see Bathgate, 1996; Brown, 1997; Fulcher, 1989; Kerslake, 1994; Ministry of Education, 1998b; Tomlinson, 1982). It may be as much a reflection of their stance on inclusion and disability as on equitable access to scarce resources and recognition of environmental factors (Bevan-Brown, 1995; Conway, 1994; Fulcher, 1989; Smith, 1999). Thus, not only have stakeholders the unenviable task of defining who has SEN, and to what degree, but also of trying to interpret the official definitions of the targeted population. It could be argued that the SEG has been redefined as the "net" to catch high needs children who are not verified for ORS – rather than the resource for moderate SEN.

Some General Issues

Codd (1988) suggests that policy documents are to be construed as expressions of particular information, ideas and intentions, and that where there has been considerable controversy surrounding the interpretation, some readers have misunderstood what was meant. This confusion has been evident when stakeholders have expressed their concerns that gifted and talented children have been funded without, in their minds at least, there being a clear correlation between the funding received and any learning or behavioural deficit (*Education Weekly*, 1998, April). Many stakeholders have been trying to interpret the SEG policy to fit old mindsets of previous models (SEDA) and their own discourse of SEN.

Definitions of SEN

Internationally, there is a strong trend towards a non-prescriptive approach to the identification of children with SEN (The Salamanca Statement, 1994). It is clear that the SEG definition reflects this, but in doing so, it has created the opportunity for stakeholders to interpret it so broadly as to allow for the spending of this funding to cover a myriad of needs, as noted in the Education Review Office report (1998, p. 6). The Post Primary Teachers Association (1998) makes the comment that without this flexibility to spend their SEG on virtually anything and anyone, some schools would be unable to spend it legally as they have no special needs children.

Equity of access vs. marketisation

A review of the international literature in one specific area of special needs suggests that there are bound to be contradictions between supporting the individual needs of those with learning delays and the individual needs of those considered intellectually privileged and advantaged (see, for example, Paquette, 1998, p. 53). It would be unfortunate if varying interpretations of the definition of target groups for SEG funding came to provide a mechanism for schools to discriminate against students with moderate SEN, and thereby regenerate a discourse of segregation running counter to the intentions of SE2000 and international inclusive practices.

Funding

The literature on funding via formula proves so far to be ambivalent. The SEG policy reflects the self-managing, self-funding role of Tomorrow's Schools, and the importance of school and community involvement in this decision-making is supported by overseas research (Department for Education and Employment, 1997; IDEA, 1995). School principals I spoke to are happy with the choice and flexibility offered by direct grant funding (see also McAlpine, 1999), but not with the formula, which is based on total school rolls and decile ratings rather than SEN roll numbers. The current SEG formula may become more problematic when Transitional Funding comes to an end for 7 year-olds. At that time "community ownership" may become divisive and partisan – with schools caught between the demands of articulate and politically astute parents of students with SEN, and the constraints of their capped funding. Few parents will see "user pays" as a viable and equitable option.

Ministry of Education research to date shows that schools are spending the SEG on a variety of interventions, many of which rely on the teacher aide model (Ministry of Education, 1998d, p. 7), which is respource hungry and carries complex employment conditions. These render it less responsive to new needs and short term requirements.

Conclusion

This policy has both weaknesses and advantages in helping schools to best meet the needs of children with moderate SEN. On the one hand, it does make it easier for them to be more responsive to needs as they arise throughout the year. It also makes it easier to try out and adopt more innovative interventions, other than a teacher aide model.

But the new policy is not easy for schools to handle, because of the conflicting discourses which exist on identifying and categorising children with SEN for the most appropriate level of funding. Unless these are addressed by clearer criteria for referrals from schools, negative responses to SE2000 and the SEG may hinder chances of this new policy being better than previous provisions. There is also the problem of schools being required to mainstream children without adequate support, which will increase the burden on hard-pressed classroom teachers.

The allocation of, and formula for, the SEG is the real "hard basket" issue for schools. The policy promotes flexibility and ready access to funding, but the formula basis of SEG is flawed when the number and needs of students with SEN can vary so greatly between schools. I would argue that this needs to be revisited and modified.

Jackson encapsulated the SEG's purpose when she commented that "It is a preventative policy aimed at getting to kids before their learning and behaviour needs escalate to needing higher level interventions" (personal communication, October, 1998). This policy does not set out to redress social ills or train for the workforce, but may in the long term have some impact on these, depending on how schools interpret and use it when moderate learning and behaviour needs first become apparent. The present crisis of confidence in the policy is a function of the way in which stakeholders interpret the SEG's purpose and identify its population.

Final Comment – What Next?

Both the Ministry of Education and the Education Review Office have carried out research and reported on the systems, management and uses of the SEG. There is an urgent need now for further research and evaluation to identify those emergent patterns which will be most cost effective, educationally efficient, and innovative.

In conclusion, I would make three suggestions which might provide a useful basis for research and debate.

- That the Government clarify the criteria for ORS funding, and that this be based on a "needs" model rather than an arbitrarily set "percentage" model;
- That schools use their "Barriers to Learning" register as a basis for their SEG funding;
- That the Ministry of Education communicate the message of equity to the wider community, and emphasise that the SEG is a resource for *all* students who have moderate SEN, including gifted children who are underachieving.

Some specific questions to guide further useful research might be:

- What SEG-funded programmes show the most measurable improvements in: a) remedial academic outcomes; b) motivation and behaviour; c) performance of underachieving gifted and talented students?
- Could school clusters be encouraged to pool their SEG to offer a cluster resource? What benefits might this show?
- If schools have moved away from a heavy reliance on teacher aides, what have been the outcomes for teachers and mainstream classes?
- How has the community perception of SEN changed with regard to the needs of underachieving gifted students.

> Few tragedies can be more extensive than the stunting of life, few injustices deeper than the denial of an opportunity to strive or even to hope, by a limit imposed from without but falsely identified as lying within. (Gould, 1981)

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The author

Margaret Chatfield has been active in the field of Special Education for the past 17 years as teacher, inclusion advocate, trainer, parent and researcher with a particular interest in the Autism Spectrum of Disorders. She began her MEd study in contemporary education policy with a paper on SE2000, from which this review is drawn. Margaret has recently been appointed as a SE2000 Resource Teacher Learning and Behaviour. She is a registered teacher, and has a Diploma in Business Studies (Training and Development) from Massey University.