Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba?

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Abstract

The department of education in the province of Manitoba has recently changed the way in which schools are funded to assist in meeting the needs of students who live with special needs. The change was the result of a task force that examined different funding models and made recommendations to the Minister of Education in November 2015. The change was deemed necessary because the application based system was detrimental to the inclusive education movement that the province has been promoting for several years. Labelling students and viewing them through a deficit model goes against inclusion and the Task Force felt this practice must change. Six student services administrators from across the province were interviewed to glean insight as to how some school divisions in Manitoba were reacting to the change in special needs funding and if there is potential to improve inclusive education in the province. Comparing the findings of this study to the literature about inclusive education it was determined that a change in funding by itself will not improve inclusive education in the province, but rather school divisions might consider using this change in funding as an opportunity to examine their own practices and begin the work of creating more inclusive schools for all.

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Chapter 1: Special Needs Funding in Manitoba

On January 7, 2016, the Minister of Education and Advanced Learning announced the province of Manitoba would eliminate the categorical based system that has been used to determine funding for students identified as living with special needs. The categorical based system would be replaced with a formula based model (Manitoba Education and Training, 2016b). The change was the result of the work of a Task Force created to examine special needs education, particularly the funding process for students identified as living with special needs. The recommendation of the Task Force was to eliminate the deficit-oriented funding application model that had been in place since 1980, including all the years since inclusion became the philosophical aspiration in Manitoba schools, and replace it with a formula based model to determine how schools are funded to meet the needs of all diverse learners (Manitoba Education and Training, 2015). A stated purpose of the funding change is to encourage more inclusive programming while minimizing the negative effects of the former categorical based funding model.

In this thesis, I examine the recommendation to change funding from the current categorical based model to a formula based model as proposed by the Task Force on Special Needs Funding (Manitoba Education and Training, 2015) (hereafter referred to as The Task Force). The Task Force outlined four risks associated with categorical based funding and four risks associated with formula based funding. These risks are examined and compared to the literature to provide an understanding of how formula based funding might improve inclusive education in the province of Manitoba.

In this thesis, I discuss two funding models: Categorical based funding and formula based funding. Up until the 2017-2018 school year, school divisions were provided some of their special needs funding under the categorical based funding model. This model is based on a medical model and required that students be diagnosed and labelled in order that they receive extra funding from the government to assist with their learning in public school. The medical model of disability according to Degener (2016) views disability as, "an impairment that needs to be treated, cured, fixed, or at least rehabilitated (p. 2). This model focuses on what is wrong with the person. The medical model does not promote inclusion because the impairment is viewed as a justification for exclusion (Degener, 2016). In Manitoba, this way of thinking was perpetuated through the funding application process. In order to determine which students required extra funding dollars, school divisions submitted individual applications to demonstrate need. Manitoba Education used rubrics to determine whether the applications met the funding criteria and then informed school divisions of the results (Manitoba Education and Training, 2016c). Subsequently, school divisions decided how the money was spent and allocated. This funding model is also referred to as student specific, low incidence, application based, and input funding. To provide clarity, I will refer to this funding model throughout this paper as categorical based funding.

The second funding model referenced in this paper is formula based funding. Formula based funding is provided using a formula designed to determine needs, always based in part on enrolment data and often, as is the case in Manitoba, with the additional consideration of socio-economic data and historical funding patterns. There are no individual student applications but rather, in the case of Manitoba, the department provides divisions with a lump sum of money to meet the educational needs of students living with special needs. Again, school divisions decide

how the money is spent and allocated (Manitoba Education and Training, 2017a). Baker and

Ramsey (2010) describe this funding model as a, "lump sum allocation based on an assumption

that a uniform share of each districts' enrollment will require special education programs" (p.

246). This funding model is also referred to as throughput, census, and block funding. To

provide clarity, I will refer to this funding model throughout this paper as formula based funding.

In this qualitative study I sought to answer the question, "What are the anticipated

changes that will result from the new formula based funding model?" Six student services

administrators from school divisions in Manitoba were interviewed for the purpose of this study.

Guided by work of Bogdan and Biklen (2007), I asked the same open-ended questions of all six

participants. The structured interview method allowed for comparable data from all of the

participants. I transcribed and analysed the data, looking for themes, and then interpreted the

results.

Purpose

The purpose of this qualitative study is to hear the perspectives of various educators about

the change in special needs funding. I review current research in the field of inclusive education

and educational reform and compare that research to the roll out of the new formula based

funding model that has become policy in Manitoba. The Task Force determined which funding

models would promote inclusive practices in schools and made recommendations to the Minister

of Education. Their recommendation was to eliminate the categorical based funding model and

replace it with a formula based funding model (Manitoba Education and Training, 2015). The

Minister accepted those recommendations. In this study, I wanted to learn how some school

divisions were planning to implement formula based funding in their schools and if there would

be any significant changes to inclusive education that result from those changes.

Manitoba Education previously attempted a limited removal of student specific funding

with little success. VanWalleghem and Lutfiyya (2013) described a 2001 Manitoba Education 3-

year pilot that included six school divisions throughout the province. The pilot eliminated the

requirement that those school divisions submit funding applications for students previously

funded under the category *Emotionally and Behaviourally Disturbed II* (EBD II). Instead, the

pilot school divisions received funds based on population and historical funding patterns and had

control over how to allocate funds and plan for students in ways they felt appropriate. However,

according to the authors some divisions were fearful that they were losing funds and had a better

chance at increased funding through the funding application process. VanWalleghem and

Lutfiyya (2013) reported that, according to the terms of the pilot project, all of the divisions

involved in the pilot project returned to the categorical based funding system and have continued

to use that funding model.

Seven Oaks School Division (SOSD) made a second attempt at moving away from the

categorical based funding model from 2010-2013. SOSD hired Proactive Information Services

Inc. to document and analyze data that examined the implementation of formula based funding in

the division.[1] Proactive surveyed parents and staff and invited them to participate in focused

conversations to examine how formula based funding was impacting inclusive education across

the division. The findings (Proactive Information Services Inc., 2013a) indicate that school

administrators and professional support staff (resource teachers, guidance counselors)

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[1] Seven Oaks School Division shared the reports completed for them by Proactive Information Services at my request. Permission was granted to reference the information from these reports in this thesis.

demonstrated great support for the change in funding as they believed that it: provided a more holistic approach to meeting students' needs; allowed for a strength-based approach; and eliminated the need to negatively label students. Teachers and educational assistants did not seem to share the same understanding of the purpose of the move to formula based funding and as a result did not see the benefits to students in the same way. Parents believed that the learning needs of their children were being met more effectively than they had been under the categorical based funding system. It is important to note that, at the same time SOSD attempted formula based funding they also intentionally changed the way inclusion was practiced in their schools. "While the funding approach, in itself, does not create these benefits, it provides a foundation for a paradigm shift" (Proactive Information Services Inc., 2013a, p. 24). This is an important consideration for schools across the province as they now shift to formula funding. It suggests that if they seek to improve inclusive education for all students, school divisions should consider how their policies and pedagogy should also evolve.

In addition to the Proactive Information Services Inc. (2013a; 2013b) reports prepared for Seven Oaks School Division, Olson (2013), writing in *The Manitoba Teacher*, a publication of the Manitoba Teachers' Society of which he was president, reported on the formula based funding project in Seven Oaks School Division. Olson claimed that the implementation of formula based funding was not very successful based on reports from members of the SOSD Teachers' Association. He reported that the pilot project was criticized by teachers as well as families who felt that the students were not having their needs met due to a lack of services and by teachers who were overwhelmed and being expected to provide services that were beyond their capabilities. Olson (2013) wrote, "It was commendable in theory. More time with kids and less time on paperwork. More teacher time and less reliance on EAs" (p. 6). He added that, "Not

every idea can be a winner," and he thanked the membership of the SOSD Teachers' Association for raising the red flag (Olson, 2013, p. 6).

There is a distinct discrepancy between the findings reported in the Proactive Information Services Inc. (2013a; 2013b) reports and the interviews with the SOSD Teachers' Association as reported by Olson (2013) in regards to the formula based funding initiative conducted by SOSD. The findings in The Proactive Information Services reports support many of the recommendations found in current literature around inclusive education, including having more professionals work with students who live with special needs, having educational assistants assigned to classrooms and not individual children, and increased collaboration amongst school staff to support all diverse students (Hehir et al., 2016; Katz, 2012; Giangreco, Doyle, & Suter, 2012; Brownlie & King, 2000). Olson (2013) reported that SOSD teachers felt that they were being asked to do too much. One can only speculate about the reasons for this discrepancy and without a study that examines both sides of the issue in a systemic and coherent manner, any possible explanations remain speculation.

Task Force on Special Needs Funding

Manitoba Education established a Task Force on Special Needs Funding made up of representatives of different stakeholder groups in Manitoba's education system including superintendents, student services administrators, parents, teachers, and school boards (Manitoba Education and Training, 2015). The Task Force reported that Manitoba has promoted inclusive education and has developed inclusive policies that have resulted in improved practice in the way inclusion is done in schools. However, the Task Force also claimed that the categorical based

funding model did not promote inclusion and should change so that inclusive education practices may continue to improve (Manitoba Education, 2015).

The Task Force did recommend that the province change from the existing categorical based funding model to a formula based model. It also clearly recommended that any successful change "would have to be carefully and methodically implemented" (Manitoba Education and Training, 2015, p. 11). The Task Force included recommendations that would be necessary for the successful implementation of the new formula based funding model. "The Task Force is very clear that the implementation of any change must be well planned, comprehensive, and involve all of the organizations represented on the Task Force Committee as well as other stakeholders" (Manitoba Education and Training, 2015, p. 11).

Rationale/Significance of the Study

The Task Force indicated that a major funding model change would likely cause systemic effects to policies, pedagogy and student learning (Manitoba Education and Training, 2015). In this study, I want to collect the perspectives of six student services administrators in order to get a sense as to how their divisions were reacting to the change in funding. These findings will be compared to the research literature on inclusive education. In the analysis section of this thesis I discuss the implications for improving educational practices at the school and divisional levels.

An announcement by the Minister of Education on January 2016 outlined a three-step process for the formula based funding model roll out to divisions across the province (Manitoba Education and Training, 2016b). Louis Riel School Division would pilot this initiative with some of its schools starting in the 2016-2017 school year. For the 2017-2018 school year other divisions would have the option of implementing the new funding model. The Minister reported

that full implementation of the new formula based funding model would be in place by the 2018-2019 school year.

There was a change to the timeline when the newly elected government announced there would not be an option for school divisions in 2017-2018. Rather the formula based funding model would be implemented for all school divisions. The government did not announce a new formula. It did indicate that school divisions will receive the same amount of funding that they received for the 2016-2017 school year (Manitoba Education and Training, 2017b).

Thus, this study occurred at an important juncture in Manitoba's progress on inclusive education. I used qualitative research methods involving interviews of student services administrators from divisions across the province. Student services administrators are responsible for everything that falls under the student services umbrella, including funding and providing appropriate resources to schools. Through the interviews, I explored the perspectives of student service administrators in regards to the implementation of the new formula based funding model. I hope that some insight can be gleaned as to how divisions might prepare for this change in funding. Furthermore, I hope that these interviews will allow for a glimpse as to what, if any, changes will occur in terms of inclusive education while eliminating categorical based funding and the deficit based application process. Therefore, the research question(s) are:

What are the anticipated changes that will result from the new formula based funding model?

   a. How do school division leaders, specifically student services administrators, prepare for and support these changes?

b. How will different roles such as the role of the principal, the resource teacher, and the classroom teacher be affected by the change according to the student services administrators?

c. How are these changes anticipated to have an impact on inclusive education at the school level according to the student services administrators?

The findings from this study provide valuable insights to the field through a comprehensive look at the research in both inclusive education and educational policy and reform. Subsequently, the study results might inform the implementation of the new formula based funding model to improve education for all of Manitoba's diverse learners.

Delimitations

The sample size of student services administrators who participated in this research study was quite small. Six student services administrators, three representing urban divisions (within Winnipeg) and three representing rural divisions participated in this study. It is important that the results of this study are interpreted with caution as the six divisions represented do not necessarily represent other divisions across Manitoba. Superintendents of Manitoba school divisions were asked to forward the invitations to student services administrators to participate in the study. The six participants in this study or their school divisions may have a greater interest in the topic of the new funding process and inclusive education in general than those who did not volunteer to be a participant which may result in limited data. However, while the sample of student services administrators was small, I was able to gain insight into the perspectives of individuals who will be responsible for implementing this funding change at the practical level.

Limitations

Data for this study were collected through semi-structured, in-depth interviews. The interview as described by Bogdan and Biklen (2007) is similar to "a purposeful conversation" (p. 103). The questions were open-ended. Asking open-ended questions provides the participant with the opportunity to go into certain topics at greater length, unhampered by the assumptions that the researcher brings to the study. Typically, this provides the researcher with more data to work with during the analysis stage. However, much of this depends on the participants and how much they are willing and able to share at the time of the interview (Bogdan & Biklen, 2007).

All Manitoba school divisions were invited to participate in this study with the exception of three. The Division Scolaire Franco-Manitobaine (DSFM) and Frontier School Division (FSD) were not invited because their funding formulas are quite different from the other school divisions and their perspective would be substantially different as there are other factors that would have to be considered. The Task Force mentioned this in their report to the Minister, "because of the unique relationships with the Federal government and the associated funding received, accommodations may need to be considered for Frontier School Division and DSFM." (Manitoba Education and Training, 2015 p. 10). Louis Riel School Division (LRSD) was also not included among invitees as they had been participating in the pilot (Manitoba Education, 2016b). Independent or private schools were also excluded from this study as they are not affected by the changed funding model. This method of sampling is described by Bogdan and Biklen (2007) as purposeful sampling in which, "you choose particular subjects to include because they are believed to facilitate the expansion of the developing theory (p.73).

Organization of the Thesis

I organized this thesis into five chapters. Chapter One was the introduction to the thesis. This section included a brief history of funding for students living with special needs in the province of Manitoba. I introduced and examined the recommendations from the provincial Task Force that recommended formula based funding to the Minister (Manitoba Education and Training, 2015). I clarified the purpose of the study, the rationale and significance of this research and its potential impact on inclusive education in the province of Manitoba.

Chapter Two is a review of the literature. I examine categorical based funding and formula based funding. I provide a historical review of funding in Manitoba and introduce a brief overview of inclusive policy from a global and local perspective. I review inclusive practices and research supporting inclusive education and compare them to the recommendations made by the Task Force. Finally I examine literature about the roles of resource teachers, principals, clinicians, and educational assistants in inclusive settings.

In Chapter Three I discuss the methods used in this research. I include a brief explanation of the participants, the data collection and the data analysis. In Chapter Four I present the results of the data collection and analyses. Chapter Five includes the discussion and recommendation section of this qualitative study. In this chapter I will discuss the anticipated changes based on my findings, how schools might prepare for the change, how supports could be organized and distributed differently, and how roles of school staff might be affected by the change.

Chapter 2: Literature Review

The purpose of this qualitative study is to examine the change in special needs funding in Manitoba through the perspectives of the six student services administrators who participated in this study. The department of education recently announced that all school divisions in the province will be funded through a formula based funding model. The change was the result of recommendations proposed by The Task Force on Special Needs Funding (Manitoba Education and Training, 2015).

To begin this literature review I will review the research on the two funding models referenced throughout this paper – categorical based funding and formula based funding. Then, I will include a brief history of inclusive education at the global, national, and provincial levels. I will include a brief overview of how Manitoba schools are funded. The Task Force outlined four risks associated with categorical based funding. I will examine and compare these four risks to current research to determine if formula funding has the potential to alleviate these risks. The Task Force also included four possible risks associated with formula based funding. I will examine and compare these four risks to the literature. To conclude the literature review, the literature on successful school reform and its leadership will be examined.

Funding Models: Categorical Based Funding vs Formula Based Funding

In developed countries there are two funding models that are used most often to fund the education of students living with special needs in inclusive oriented schools. One of these models is the categorical based funding model that Manitoba was using prior to the 2017-2018 school year. According to Fletcher-Campbell, Pijl, Meijer, Dyson, and Parrish (2003), this model, also known as the input funding model, is based on student needs. Funding is allocated to

schools and divisions based on the number of children identified as living with special needs. The categorical based funding model has been widely used in many countries. The authors examined the use of the categorical based funding model in The United States and The Netherlands and made the argument that the number of students requiring extra supports increased dramatically because of its use.

The main argument for the use of a categorical based funding model for students living with special needs is that the students are identified and the funding is attached to individual students. Thus there is increased likelihood that identified students will have their educational needs met (Fletcher-Campbell et al., 2003). Baker and Ramsey (2010) argue that identifying students allows for more support and opportunities for children who need particular programs and services.

There are two main arguments against the use of categorical based funding. The first is that it is based on labelling which has the potential to stigmatize students receiving the support (Fletcher-Campbell et al., 2003). Because individual students are required to be identified as having special needs the authors claim this label can lead to stigmatization. Another problem that may arise from the use of categorical based funding is that it has the potential to lead to over-identification of students living with special needs (Baker & Ramsey, 2010). This may lead to students being unnecessarily placed in segregated special education classes or schools (Fletcher-Campbell et al., 2003). Fletcher-Campbell et. al (2003) note, "There is growing evidence that some schools are more successful at presenting their case for a pupil receiving funding than others" (p. 227).

Another commonly used funding model as described by Fletcher-Campbell et al. (2003) is the throughput model. This is very similar to what The Task Force referred to as formula based funding. In this model, funding is not attached to a particular child, but on services within a school. The funds, Fletcher-Campbell et al. (2003) explain, are based on the total enrollment in an area. This model has also been described by other researchers as the census model and it has become a growing trend in several American States (Baker & Ramsey, 2010; Parrish, 2000). This model is similar to the block funding model that VanWalleghem and Lutfiyya (2013) describe. Sometimes referred to as "level one funding", the correct definition of this block of funding received by school divisions is *The Student Services Grant* and it is distributed by the province under the base support category (Manitoba Education and Training, 2017a).

From an inclusive perspective the formula based funding model seems to be the least restrictive model. The work of The Task Force supports this view (Manitoba Education and Training, 2015). According to Parrish (2000), formula based funding has many benefits and reduces the likelihood that students living with special needs will be labelled in ways that will stigmatize them.

There are several cautions mentioned in the literature that are important to understand when talking about formula based funding. Parrish (2000) warns the distribution of funds may not be equitable. If we think of this in terms of Manitoba we know different areas have different levels of need. Another important consideration with formula based funding is schools may not be as accountable as they were under a categorical based model. The Task Force also warned of this in its report (Manitoba Education and Training, 2015). It will be essential for schools and divisions to put checks and balances in place so students do not slip through the cracks.

The Task Force clearly laid out both the pros and cons of formula funding. By providing a context of funding of schools in Manitoba as well as a historical outline of inclusive education in Manitoba it is clear that the change in funding for students living with special needs from a categorical based model to a formula based model could be considered a positive move towards a more inclusive educational system in the province. Manitoba Education has provided a clear expectation to school divisions that they are to implement inclusive practices and they have backed up that expectation with resources and supports to help divisions create inclusive cultures in their schools. Through interviews with student services administrators from across the province, I hoped to glean some insight as to how different divisions are planning for this change in funding. I also hoped to get a glimpse as to how divisions have and will continue to work at creating inclusive schools for all.

A Brief History of Inclusive Education

In 1994 in Salamanca, Spain, at the *World Conference on Special Needs Education: Access and Quality* the Salamanca Statement and the Framework for Action on special needs education was born. It called for action by all countries to ensure that inclusive education occurs for all learners (UNESCO, 1994). The framework states that "[schools] should accommodate all children regardless of their physical, intellectual, social, emotional, linguistic, or other conditions" (UNESCO, 1994, p. 6). The Salamanca Statement included many recommendations that were intended to improve education for those students identified as living with special needs around the world. Many countries and jurisdictions have worked towards creating more inclusive schools, including Canada and the province of Manitoba.

In their report on *Inclusive Education in Canada: The Way of the Future*, the Council of Ministers of Education, Canada and The Canadian Commission for UNESCO (2008) described reforms and policies established by each of the ten Canadian provinces and the three Canadian territories that have written inclusive education into policy. In this report the authors discuss particular groups of Canadians who are at risk for exclusion including students with physical, emotional, mental, and learning challenges. The authors of this report go on to describe several initiatives that each of the Canadian provinces and territories have implemented to help ensure inclusive education for all of the at-risk groups. The Council of Ministers of Education, Canada and The Canadian Commission for UNESCO (2008) concluded that:

> The flow of the report from the broad framework of legislation and policy that protect
> and define the equal rights of individuals and access to public education, through the
> wide ranging educational reforms, to the specific programs developed for the most
> vulnerable groups, to the description of the activities in schools and classrooms has
> stressed the comprehensiveness of the belief in and services to provide inclusive
> education in the educational jurisdictions in Canada. The approaches are not add-ons or
> occasional efforts but integral to the design delivery of education at all levels. (p. 65)

In 2005, the Manitoba Government passed into law an amendment to the *Public Schools Act* subtitled *Appropriate Educational Programming Amendment* to the *Public Schools Act*. This amendment set out to ensure that all Manitoba students, including those identified as living with special needs, have a right to an appropriate education. The amendment and regulation formed the basis for rules that school divisions are obligated to follow so that all students are educated in as appropriate an environment as possible.

Those rules were clarified when Manitoba Education, Citizenship, and Youth published *Appropriate Educational Programming in Manitoba: Standards for Student Services* (2006) and *Appropriate Educational Programming in Manitoba: A Handbook for Student Services* (2007). These documents outlined in detail how divisions and schools should plan and implement appropriate educational programming for all students. The definition of inclusion at the beginning of the document is the same definition on Manitoba Education's website today:

> Inclusion is a way of thinking and acting that allows every individual to feel accepted, valued and safe. An inclusive community consciously evolves to meet the changing needs of its members. Through recognition and support, an inclusive community provides meaningful involvement and equal access to the benefits of citizenship. In Manitoba, we embrace inclusion as a means of enhancing the well-being of every member of the community. By working together, we strengthen our capacity to provide the foundation for a richer future for all of us. (Manitoba Education, Citizenship, and Youth, 2007, p. 1)

Over the last decade, The Student Services Branch of Manitoba Education has provided much support to school divisions in the area of inclusive education. Their website provides information and documents that assist in planning and programming for diverse students including those living with special needs. There are documents for parents and educators that are related to transitions, individualized education plans (IEPs), promoting positive behaviour, and strategies for working with students who live with autism or FASD (Manitoba Education and Training, 2016a).

It is important to differentiate between the rules outlined in the *Appropriate Educational Programming Amendment* to the *Public Schools Act* and the Department's philosophy of inclusion. The rules outlined in the amendment are the minimum expectations of accessibility to

schools and curriculum that divisions must provide to students living with special needs. These are the laws that govern Manitoba Schools. The philosophy of inclusion and the supporting documents are so much more than a minimum. They are based on research of best practice and are what schools in Manitoba should (according to Manitoba Education) strive to work towards to improve the lives of all diverse students. This research study examines the change of special needs funding through the lens of inclusion.

Funding of Manitoba Schools

Public schools in Manitoba are directly funded by both the provincial government and the local school division. According to Manitoba Education and Training (2017a), the provincial government is responsible for approximately sixty percent of the cost and the other forty percent is paid for by taxes collected at the local level. School divisions are allowed to set their own mill (taxation) rates to determine the amount of money they collect from taxpayers. Any annual increase in school taxes is usually a small increase as school taxes are a highly political issue. School divisions in Manitoba are governed by school boards who are comprised of elected school trustees. Raising school taxes seems to be a thoughtful process that needs to be justified to the local taxpayers who are also the ones called upon to vote in school board elections every four years. The amount that school divisions receive from the province comes in the form of Base Support, Categorical Support, and Equalization Payments (Manitoba Education and Training, 2017a). The Base Support that school divisions receive from the province is based on the previous year's enrollment on September 30.

Funding for students living with special needs in Manitoba falls under the Categorical Support section; specifically the section entitled Special Needs. School divisions also receive support under the Base Support section by way of a Student Services Grant which is also

intended to be used for the education of diverse student populations who require additional learning supports (Manitoba Education and Training, 2017a).

Up until the 2017-2018 school year, the province used the categorical based funding model to distribute funding for students living with special needs. School divisions submitted funding applications up to three times per school year, following provincial guidelines (Manitoba Education and Training, 2016c). If a student met the criteria for level two funding the school division received $9220 per year and if a student met the criteria for level three funding the school division received $20,515 per year (Manitoba Education and Training, 2016c).

Manitoba Education and Training (2016c) provides examples of how school divisions could use the money once a funding application had been approved and the dollars distributed to the school division. The examples listed include: EA time; clinician time; resource teacher time; counsellor time; or to purchase assistive technology. The directive from the department was that the money was to be used to assist in the education of a student identified as living with special needs and the way in which the money was spent must benefit the student for whom the money was applied for. The department never mandated that funding dollars received by school divisions be put towards employment of educational assistants. It seems that when school divisions submitted funding applications on behalf of students living with special needs, they did so with the intent to hire an educational assistant with the funding dollars. This practice will be examined in greater detail later in this chapter.

The 2017-2018 school year was the first year all school divisions receive a lump sum of money to assist with the education of students previously funded level two or level three. "School divisions will be provided with the same level two or level three funding amount that was provided in 2016-2017. No funding applications are required for the 2017-2018 school year"

(Manitoba Education and Training, 2017a, p. 10). The provincial document goes on to explain that funding applications will still be required for students who require additional supports under the category emotionally and behaviourally disturbed level three (EBD 3) and level A URIS (medical support). This was a recommendation made by the Task Force in its report to the Minister (Manitoba Education and Training, 2015). Prior to the 2017-2018 school year, school divisions received level two and level three dollars for students using the categorical based funding model.

Categorical Based Funding vs Formula Based Funding

The Task Force proposed that Manitoba should change its current categorical based funding model to a formula based funding model partly so school divisions in the province can move towards more inclusive practices. The Task Force outlined four risks associated with both categorical based funding and formula based funding. Each of these risks will be discussed and compared to the literature.

The risks associated with categorical based funding.

The first risk identified by The Task Force (Manitoba Education and Training, 2015) was that the use of funding applications promotes the labelling of students as it relies on diagnostic information. The funding application itself requires diagnoses or assessments by clinicians or medical professionals.

The argument is not whether a strength based funding model is better than a deficit based funding model. Educators can see the value in determining a child's strengths and using those strengths to help them learn. In 2011, The Saskatchewan Ministry of Education [SME] (2011) published the document A*ctualizing a Needs-Based Model to Support Student Achievement.* The

document states, "While we recognize that universal classroom practices will meet the needs of most students, some students will require short-term targeted supports in order to be successful" (SME, 2011, p. 1). The document discusses the change from the medical model of support to a needs-based service delivery model. The important difference between the two is that the needs-based model ensures that "students receive appropriate services, not just the services for which they qualify" (SME, 2011, p. 3).

According to Thomson (2012), educators need to be conscious that students are not being excluded based on labels, but labels have a place in education and many times they do help us understand students and how best to teach them. For example, when a student is diagnosed with a particular learning disability it is much easier to find interventions that may work for that student when educators know what they are working with. According to Lauchlan and Boyle (2007), a label can help a student and their family gain access to services and support that they would not have access to if they did not have a label. An example of this is a student living with autism who has a diagnosis from a medical doctor and is able to access a variety of summer programs and camps that he/she would not be able to attend without a diagnosis. According to van Swet et al. (2011), labels may actually help the child and his/her family start to find and work on strategies that will help the child. According to Tomlinson (2012), "In the public and often political mind special educational needs are associated with what appear to be recognizable conditions - physical, sensory or multiple disabilities on which there can be some agreement, especially if they fall within what appears to be a medical sphere of competence" (p. 273).

It is always imperative educators keep in mind there can be some devastating implications for a child who is labelled. According to Lauchlan and Boyle (2007), "[the] potential negative impacts are huge: stigmatization; bullying; reduced opportunities in life; a

focus on within-child deficits to the exclusion of other, often more significant factors;

misclassification; and lowered expectations about what a "labeled" child can achieve" (p. 41).

The second risk identified by The Task Force (Manitoba Education and Training, 2015)

is gathering data and writing funding applications uses a lot of time and resources. In other

words, resource teachers and clinicians spend a lot of time assessing and writing funding

applications and this takes time away from helping the child with interventions that would

promote learning and independence.

The Saskatchewan Ministry of Education (2011) identifies important differences between

the medical model that is implicit in the categorical based funding model and the needs based

model. The Saskatchewan Ministry of Education (2011) discusses how the roles of professionals

will change under the new system, for instance from one in which each professional works alone

as an expert in their field to a more collaborative approach in which professionals come together,

"to a reflective and holistic approach that is responsive to students' needs" (p. 5). While the use

of a formula based model for special needs does not equate to a needs based approach, it seems

to fit better with this model than it did with the categorical based funding model.

Considering the role of resource teachers specifically, it is likely that, as we move to

more inclusive educational practices, the role of the resource teacher will also have to change. As

the formula based funding model is implemented in Manitoba, resource teachers will not be

required to write funding applications. AuCoin and Porter (2013) discuss the change from

integration to inclusion. In settings that were (or maybe still are) more integrated the resource

teacher likely spent most of his/her time working with individual students or with small groups.

This was likely done in a "pull-out" format in which students are taken away from their

homeroom classes and peers to an isolated setting to work on academics or skills (Katz, 2013).

As we evolve in the practice of inclusion, it is important that the roles of professionals in our

schools continue to evolve as well. According to both AuCoin and Porter (2013), as well as Katz

(2013), the new role of resource teachers in inclusive settings must include a shift from working

with students to working with teachers. This shift allows the resource teacher to share his/her

experience and knowledge with classroom teachers to assist them in teaching all of the diverse

learners in their classrooms. Manitoba Education and Advanced Learning's (2014) support

document describes the universal roles and responsibilities of resource teachers which include:

support to teachers; student support; management; leadership; and other duties. The document

recommends that the bulk of the work should be supporting classroom teachers. In inclusive

schools this support might be a resource teacher and a classroom teacher co-planning and co-

teaching universally designed lessons. It might also be coaching or consulting with a teacher to

plan for the needs of all students in a classroom including those who live with special needs.

One question is how can we expect classroom teachers to meet the needs of all of the

diverse learners in their classroom? Excluding students from their classrooms (pull-out) or the

social learning in their classrooms (working in the back of the room with an adult such as a

resource teacher or an educational assistant) has proven to have a negative impact on students'

self-esteem and sense of belonging (Giangreco, 2010). So what can schools do to meet the needs

of all learners within the classroom? Katz (2013) talks about collaborative practice which

includes activities such as coaching, co-teaching, and consulting as ways resource teachers can

share their knowledge and expertise with classroom teachers to work with diverse needs. Equally

important is classroom teachers who are experts on curriculum and pedagogy will share their

knowledge with the resource teachers (Katz, 2013). In other words, the relationship between

classroom teachers and resource teachers in inclusive schools is one in which knowledge and

expertise are shared through a collaborative process that is respectful and always focussed on

meeting the needs of all diverse learners in a classroom. AuCoin and Porter (2013) agree that

schools can be truly inclusive only when classroom teachers are supported by resource teachers

through co-teaching, co-planning, consulting, and coaching. "When school cultures are truly

inclusive, school administrators will understand and expect the role of the resource teacher to be

predominately collaborative, they will insist that resource teachers prioritize coaching and

working with classroom teachers" (AuCoin & Porter, 2013, p. 27). Manitoba Education and

Advanced Learning's (2014) support document clearly states, "When the primary role of the

resource teacher in an inclusive school environment focuses on supporting and working with

classroom teachers, all students benefit" (p. 51).

Under the new formula based funding model proposed by The Task Force the role of the

school clinician may also change. In a research study that looked at in-class collaboration

between teachers and speech-language pathologists (SLPs), Pena and Quinn (2003) found when

SLPs and classroom teachers work together collaboratively in classrooms, the results are positive

for student learning. Ritzman, Sanger, and Coufal (2006) claim the classroom is a great place for

students with language or speech disorders to learn from their peers. In a case study of an SLP

who worked collaboratively in classrooms alongside classroom teachers, the authors found this

in-class model reduced the amount of pull-out programming for students with language or

speech disorders. The authors do go on to caution that their findings do not determine if in-class

or pull-out services were more effective, just that in-class services are an option in inclusive

programming. Further, in the recent past, clinicians provided diagnoses that enabled the school

division to apply for funding. This often took up a lot of the clinician's time. With the new

funding model, clinicians may be able to actually work with students and their teachers.

The third risk identified by The Task Force is that "[the] process does not encourage a

change in how divisions use the funding" (Manitoba Education and Training, 2015, p. 18). In

Manitoba, most often when a student is granted funding, an educational assistant is hired to help

(Manitoba Education, Citizenship, and Youth, 2001). It is important to note Manitoba Education

never mandated the hiring of educational assistants to work with students who had received

either level two or level three funding. However, it seems that is exactly what happened in school

divisions across the province. In March of 2009, the Canadian Teachers' Federation reported the

ratio of educational assistants to teachers in Manitoba schools was one EA for every two

teachers. At that time, it was projected that if the trend continued, the ratio between educational

assistants and teachers in Manitoba would be one to one (Canadian Teachers' Federation, 2009).

It seems the funding application process itself perpetuated the practice of hiring educational

assistants when funding applications were approved by the province.

There is a lot of research that talks about the misuse of educational assistants in our

schools. That is not the fault of educational assistants but, rather, the fault of the system. Like the

new role of the resource teacher, the role of the EA could become one in which their main task is

to assist teachers in meeting the needs of all of the learners in a classroom.

According to Brown, Farrington, Knight, Ross, and Ziegler (1999), as integration started to

become the norm in North American schools, educational assistants (often referred to in the

American context as paraprofessionals and teacher assistants in the British context) moved from

the segregated system to the integrated system in public schools. The students the educational

assistants were hired to work with, according to Brown et al. (1999), "could not learn very much so those hired to be with them did not need to know very much" (p. 250). More and more educational assistants are hired to work in schools today to support students living with special needs. In inclusion oriented schools, Giangreco, Broer, and Suter (2011) found schools are often over-using educational assistants and thus limiting the amount of instruction time a student living with special needs actually receives from a qualified classroom teacher, and, furthermore, most often educational assistants have had very little training and are often asked to do things beyond their capabilities.

One Canadian study looked at the perspectives of students in regards to educational assistants. Tews and Lupart (2008) found "[teacher] interactions with students were limited when compared with student interactions with EAs and thus the social standing of the student is unlikely to be promoted as a function of the teacher/student relationship" (p. 44). The goal of inclusion has to be both social and academic inclusion. Educational assistants might create barriers for students living with special needs in terms of social inclusion (Tews & Lupart, 2008). According to Causton-Theoharis (2009), adults supporting students living with special needs in classroom settings often provide support in a way that is invasive and intensive. Causton-Theoharis (2009) believes "when support becomes invasive it undermines the purpose of inclusion" (p. 37). Some examples of barriers and invasive support have been described by Giangreco (2010). He claims these barriers are well documented in the literature and students who are assigned the help of educational assistants may face "unnecessary dependence, stigmatization, interference with teacher engagement, interference with peer interactions, and limited access to competent instruction" (Giangreco, 2010, p. 341).

Rubie-Davies, Blatchford, Webster, Koutsoubou, and Bassett (2010) conducted research in England that compared teachers and educational assistants in their interactions with students. The researchers found some of the interactions and responses from the educational assistants were actually detrimental to student learning. One example is many of the educational assistants were observed assisting students to finish assignments with very little regard to the understanding of the concepts being taught. The researchers also found at times the educational assistants did not understand the concepts being taught but were in a position where they were supposed to help the student learn the concepts. The researchers concluded "TAs (EAs) are not teachers and we should not expect the same from them and the deployment of TAs as the primary educators for supported pupils, engaged in teaching interactions is unacceptable" (Rubie-Davies et al., 2010, p. 446).

Many argue educational assistants should be replaced with qualified teachers and clinicians (Brown et al., 1999). Giangreco et al. (2012; 2011) and Brown et al. (1999) have indicated the use of a one-on-one educational assistant should be used only when absolutely necessary and the need for this practice should be continuously evaluated. Furthermore, according to Giangreco et al. (2012), when an educational assistant is used, he or she must be trained, have a clear understanding of his or her role, and must be properly supervised. Assigning a one-on-one educational assistant should be a temporary intervention and the goal is independence with reducing support as independence is achieved (Giangreco et al., 2012).

The final risk identified by The Task Force was the application process may not really demonstrate a need for extra supports. As stated earlier, it has been difficult to obtain funding for students who do not have a medical diagnosis. Often students who do not have a diagnosis require additional supports. Student need is a far better indicator of support needed than a

medical diagnosis or a categorical label (Saskatchewan Ministry of Education, 2011). Using a

medical model to determine need has created barriers for students and their families when no

such diagnosis exists. The Saskatchewan Ministry of Education (2011) states that using a needs-

based model to determine appropriate supports involves three guiding principles:

> 1. Inclusionary philosophies and beliefs. This includes such
>
> supports as differentiated instruction, parental engagement,
>
> fostering independence, and the use of assistive technology.
>
> 2. Intervention planning. This includes having a clearly defined
>
> referral process, personal program plans, transition planning, and
>
> service coordination.
>
> 3. Interpersonal Collaboration. This includes making sure that staff
>
> is qualified, professional development, school team collaboration,
>
> and engagement of agencies. (p. 4)

The risks associated with formula based funding.

The Task Force also identified four risks associated with the formula based funding

model (Manitoba Education and Training, 2015). Each of these risks will be discussed in some

detail and compared to the literature.

The first risk identified by The Task Force is "the model (formula based) reduces

accountability for the presence of a disability to get funding from the government" (Manitoba

Education and Training, 2015, p. 18). This means that a diagnosis provided some accountability.

Under the new formula funding model, anyone who is determined to have needs can receive

some support regardless of having a medical diagnosis. School divisions and schools will need to consider how funding is divided and to whom. If school divisions simply assign educational assistants to schools that are able to show need for a particular student, they will be no further ahead in terms of inclusion than they are now with a categorical funding application based system. Education and professional development is necessary for all of the stakeholders, including parents of students living with special needs, teachers, administrators, student services administrators, superintendents, and trustees.

There are different models that can be used to determine student need. One such model is the Response to Intervention Model (RTI) and is recommended by Manitoba Education and Advanced Learning (2014). RTI involves three tiers. Tier 1 includes quality teaching strategies including Universal Design for Learning (UDL), differentiated instruction, and co-teaching between the classroom teacher and the resource teacher (Katz, 2013). In other words, the first intervention for all learners is good classroom teaching, based on research based practices and pedagogy, to address the needs of all learners from the get go.

If students demonstrate challenges despite quality Tier 1 teaching practises, it is time to consider Tier 2 supports. Tier 2 continues to rely on quality classroom instruction but may also include small group or whole class interventions using research based practises designed to improve student learning (Manitoba Education and Advanced Learning, 2014). Tier 3 of the RTI model involves more specialized interventions specific to the student who has demonstrated difficulty despite quality Tier 1 and Tier 2 interventions. According to Manitoba Education and Advanced Learning (2014), Tier 3 interventions are usually provided by the resource teacher or other specialist. While the resource teacher may have the training to implement more intensive interventions, it is important that the classroom teacher be involved in the planning and

implementation of these interventions by working alongside the resource teacher (Manitoba Education and Advanced Learning, 2014).

Universal Design for Learning (UDL) is also recommended as a framework that promotes inclusion. Manitoba Education and Advanced Learning (2014) explains that "[in] education, universally designed schools, classrooms, curricula, and materials provide all students with access to the resources they require regardless of student needs" (p. 6). In other words, supports are provided to all students based on classroom need rather than individual student needs or diagnosis. In addition, universally designing a classroom can reduce the stigma often associated with special needs. For example, if a student requires sensory reducing tools such as noise reducing headphones, the teacher would have more than just one pair available so all students can benefit from blocking out noise from time to time.

In addition to Response to Intervention and Universal Design for Learning, schools might consider using the class review process as described by Brownlie and King (2000). Using class reviews allows teachers to determine their class strengths and challenges while setting goals to help all students achieve success. Then the school based team, which might include a school administrator, will decide the best way to support each classroom teacher in meeting the needs of all diverse learners.

The second risk of formula based funding identified by The Task Force is there is no distinction between the three levels of need. Under the previous, categorical based funding model there were three levels of funding to meet student need in the province. The first level was a student services grant that was distributed to divisions based on population. School divisions used this grant to meet the needs of students with mild to moderate learning or behaviour

challenges, while level two and level three funding resulted from the individual application

process (Manitoba Education and Advanced Learning, 2014).

The challenge under a formula based model as proposed by The Task Force is there will

no longer be criteria set as to who meets level two or three funding. There is some risk associated

with a funding system that does not identify particular students as needing support. Baker and

Ramsey (2010) talk about the possibility that students living with special needs may not have

their needs met if they are never identified. The authors claim when students are identified and

funds provided specifically for them, there is more likelihood that programming will address

their needs. A similar concern in regards to formula based funding is there is much evidence that

shows students living with special needs are not evenly distributed across schools (Baker &

Ramsey, 2010; Fletcher-Campbell et al., 2003). English language learners and those living with

special needs often live in higher poverty areas. Higher areas of poverty could actually receive

less money while having more students with higher needs to educate (Fletcher-Campbell et al.,

2003).

The third identified risk associated with a formula based funding model according to The

Task Force is the onus for determining where support (money) is going will now be in the hands

of school divisions. Again, educating all partners in education is going to be vital. Student

service administrators will have to ensure school principals and resource teachers understand

research proven models that promote inclusion and quality instruction for all learners in diverse

classrooms. Using Universal Design for Learning and the Response to Intervention models are

examples of ways schools can ensure access to quality instruction and improved student learning

for all (Manitoba Education and Advanced Learning, 2014). School principals will have an

integral role here and they need to be educated on best inclusive practices to ensure all students'

needs are met.

Theoharis and Causton (2014) developed a comprehensive school and system wide

process to assist school and school division leaders to create inclusive schools for all learners.

Theoharis and Causton (2014) define inclusion as "students with disabilities being educated in

the general classroom and having full access to the general education curriculum, instruction,

and peers, with needed supports" (p. 83). They then describe a seven step process in which

schools and divisions can work towards meeting the goal of inclusion as defined above. The

seven steps are:

1. Setting a vision.

2. Creating service delivery maps that represent the current service delivery

    model.

3. Aligning school structures.

4. Rethinking staffing and creating instructional teams.

5. Impacting classroom practices.

6. Ongoing monitoring, adjusting, and celebrating.

7. Ongoing: Creating a climate of belonging. (Theoharis & Causton, 2014, p. 83-

    87)

As schools and divisions move forward in the area of inclusion in the province of

Manitoba it will be important to create processes such as the one described by Theoharis and

Causton (2014). This will assist school leaders, including principals and resource teachers, to

determine how to best meet the needs of all learners including those who live with special needs.

The final risk associated with a formula based funding model is the role of the resource teacher will be forced to change. Education for administrators and resource teachers is going to be imperative here. Administrators will need to insist that the role of the resource teacher(s) in their buildings shift to a more collaborative role which will include co-teaching, coaching, and consultation (Katz, 2013; AuCoin & Porter, 2013). Professional development will be crucial for both resource teachers and administrators as schools adopt more inclusive practices to meet the needs of all diverse learners. Manitoba Education and Advanced Learning's (2014) support document is a helpful tool for school principals to review with all staff to develop understanding the changing role of the resource teacher.

Inclusive Education: What the Research Tells Us

The underlying premise of inclusive education is all students regardless of ability have access to both the academic and social aspects of school. Manitoba Education, Citizenship, and Youth (2007) outlines how school divisions must ensure all students have access to appropriate educational programming as mandated under the 2005 Amendment to the Public Schools Act. This support document clearly outlines the belief that "[inclusive] schools provide learning environments that are accessible to all students as places to learn, grow, be accepted, and enjoy the benefits of citizenship" (Manitoba Education, Citizenship, and Youth, 2007, p. 7).

So what is inclusion and why is it so important? According to Prustlow (2003), education must "prepare students for active and responsible participation in a free and democratic society" (p. 67). If we want to live in an accepting and inclusive society, we can only get there by creating accepting and inclusive schools (Katz, 2012; Prustlow, 2003).

The move from service delivery based on the medical model to a needs based model is

one way schools might work towards ensuring the diverse needs of students are met without

labels and stigmas. The Saskatchewan Ministry of Education (2011) argued that a needs based

service delivery model helps to ensure that students receive the programming supports that will

help them be successful with or without a diagnosis. The change from a medical model to a

needs based model is outlined in the following chart (p. 5):

Medical Model	Needs-Based Model
from a focus on the diagnosis and/or the categorical label of the student's disability	**to** a focus on the needs, strengths, and abilities of the student
from an emphasis on the "problems" or deficits of the student that need to be "cured" or managed	**to** an emphasis on the supports that the student requires and the elimination of barriers that obstruct access
from an approach that fosters dependence by sheltering and protecting the student	**to** an approach that nurtures independence/ interdependence by providing opportunities that promote the development of personal empowerment and self-determination
from a view that the student will benefit best by functioning in specialized environments in relative seclusion from others	**to** a view that the student will benefit best by functioning within the immediate community and wider society
from an unchanged society that expects the student to adapt to the environment in order to be included	**to** an evolving society that believes that all students belong and are valued members of a diverse society
from an attitude of pity and charity towards those with disabilities	**to** an attitude of respect and appreciation for diversity

Based on the literature, inclusion is possible. Many schools are achieving it and many are

working towards it. To get there, collaboration among educators is crucial (Manitoba Education

and Advanced Learning, 2014; Katz, 2013; Saskatchewan Ministry of Education, 2011;

Prustlow, 2003; Brownlie & King, 2000). Manitoba Education and Advanced Learning (2014)

recommends four service delivery models that schools and divisions can use as they work

towards greater inclusion. These are the consultative-collaboration model, the co-teaching

model, response to intervention (RTI), and the universal design model (Manitoba Education and

Advanced Learning, 2014).

Leadership for Inclusive Educational Reform

There is a lot of research that looks at school reform and school change. Much of this

research looks closely at the role the school principal plays in successful school reform. With

regard to inclusive education, there is a smaller, but developing body of work. McLeskey and

Waldron (2015) state that "[strong], active principal leadership to ensure that teachers share core

values and an institutional commitment to developing an effective inclusive school are one of

three must haves for an effective, inclusive school to be developed and sustained" (p. 68).

Guzman (1997) shared several characteristics among school principals in successful inclusive

schools. These characteristics include: open communication with staff; principal involvement in

the IEP process; principal and parent communication; building collaboration with staff to work

towards the common goal of inclusion; policies to deal with behaviour related discipline issues

for students living with special needs; professional development for principals that focus on

inclusion; teacher evaluations that focus on inclusive practices; and good problem solving skills.

The school principal has an enormous amount of influence over what happens in the school.

A. L. Edmunds, Macmillan, Specht, Nowicki, and G. Edmunds (2009) state:

Principals enhance school culture by developing and celebrating common beliefs and

attitudes among teachers and staff. By actively seeking out and implementing

appropriate and timely professional development in inclusive practices for all school

personnel, educational leaders will improve instructional applications, foster ongoing

positive attitudes about inclusion and students with exceptionalities, and cultivate

authentic school environments that move inclusion. (p. 21)

The idea that school leaders must work towards creating a collaborative culture if the

schools they lead are to be successful comes up time and time again in the literature (Fullan &

Quinn, 2016; Hargreaves & Ainscow, 2015; Leithwood, 2010). According to Fullan and

Quinn (2016), successful leaders will "create a culture of growth; know how to engage the

hearts and minds of everyone; and focus their collective intelligence, talent, and commitment

to shaping a new path" (p. 47). Furthermore, it is important for staff to share a common belief

or vision as to what inclusion means to them and the students they serve (Hoppey &

McLeskey, 2013). Staff may have certain assumptions as to what particular students are

capable of learning and it is vital that leaders work staff through these assumptions to come

up with a shared understanding of inclusion and what it means for all diverse learners

(Ainscow & Sandill, 2010).

The province of Ontario set out to improve student learning for all learners and close the

gap in literacy and numeracy between typical students and those students living with special

needs (Hargreaves & Ainscow, 2015). Teachers reported more collaboration among staff

members including more cooperation between classroom teachers and resource teachers.

Creating a shared set of beliefs is evident when many of the educators reported that there was a

shift in thinking from "my students, to our students" (Hargreaves & Ainscow, 2015, p. 46).

In a meta-analysis of successful school districts seen as closing the gap between diverse

learners, Leithwood (2010) found ten shared characteristics among these school districts. One of

these characteristics included a focus on student achievement in which the educators developed a

shared vision of achievement to close the gap between diverse groups by raising academic expectations for all learners. Inclusive education has to focus on academic success and expectations for all learners must be set high.

Capacity building and quality professional development is another important characteristic of successful school reform (Fullan & Quinn, 2016; Hoppey & McLeskey, 2013; Leithwood, 2010) and school leaders play a vital role in this area. According to Hoppey and McLeskey (2013), the role of the principal should be one of a coach or a mentor. Professional development, according to Leithwood (2010), must be differentiated for individual professionals based on their needs. Like students in inclusive schools, teachers are also a diverse group of learners and school leaders must take this into account when planning for professional development opportunities. Fullan and Quinn (2016) also looked at the success of the Ontario school reforms that set out to close the gap between students living with special needs and typical students while improving literacy and numeracy education for all. Fullan and Quinn (2016) claim a large part of the success in Ontario was due to "improving teaching and learning at all levels of the system by using a capacity building approach" (p. 42). Successful school leaders recognize the importance of building teacher capacity and creating collaborative cultures for both the social and academic success of all diverse learners.

The Task Force clearly laid out both the pros and cons of formula based funding. By providing a context of funding of schools in Manitoba as well as a historical outline of inclusive education in Manitoba it is clear that the change in funding for students living with special needs from a categorical based model to a formula based model should be considered a positive move towards a more inclusive educational system in the province. Manitoba Education has provided a clear expectation to school divisions that they are to implement inclusive practices and they have

backed up that expectation with resources and supports to help divisions create inclusive cultures

in their schools. Through interviews with student services administrators from across the

province, I hoped to glean some insight as to how different divisions are planning for this change

in funding. I also hoped to get a glimpse as to how divisions have and will continue to work at

creating inclusive schools for all. In the next chapter, I provide a description of the qualitative

research methods that were used to gather the data for this study.

Chapter 3: Research Methods

In this study, I used qualitative research methods to examine the perspectives of student services administrators regarding the funding model changes in Manitoba's education system. The Department of Education is changing the way in which students living with special needs are funded in Manitoba public schools. The change was based on recommendations made by a Task Force created to examine special needs funding in Manitoba. The Task Force recommended the province change from a categorical based funding model to a formula based funding model with the hopes the change would assist in improving inclusive education in Manitoba Schools (Manitoba Education and Training, 2015).

The purpose of this qualitative study is to examine the potential effects of the change in funding for students living with special needs in the province of Manitoba and to determine if this change will have an impact on inclusive education throughout the province. Six student services administrators from across Manitoba were interviewed.

In this study, I examine how student service administrators are preparing for the change in special needs funding in Manitoba and what outcomes they hope to achieve. Data for the research was obtained through interviews with each participant interviewed one time. Each interview lasted approximately one hour. Participants and their school divisions will remain as anonymous as is possible in a small province like Manitoba.

Research Participants

The research participants in this qualitative study were student services administrators representing various school divisions in Manitoba. After receiving ethics permission to conduct this study from the Education Nursing Research Board (ENREB) at the University of Manitoba

(Appendix A), I began the work of recruiting student services administrators to participate in my study.

The rationale for interviewing student services administrators is they are responsible for overseeing programming supports for students living with special needs within their school divisions. Among other responsibilities, student services administrators distribute supports to schools to assist in the education of all diverse students. Student services administrators work with clinicians, resource teachers, administrators, and other school staff to support the needs of students who live with special needs. Some student services administrators in Manitoba are members of the senior administrative team in the school division where they work and hold the title, *Assistant Superintendent of Student Services.* Others are one step below and report directly to an assistant superintendent. Thus, student services administrators are well informed and wield a lot of decision making power. It is likely that student services administrators will be called upon to lead the change from categorical based funding to formula based funding.

The method of sampling that I used in this study was purposeful sampling. I decided to exclude three school divisions from the study which according to Cohen, Manion, and Morrison (2000), means that I invited 34 school divisions to participate for a specific purpose. In this case, the specific purpose was I wanted to gain the perspectives of student services administrators from divisions who would be similarly impacted by the change in funding. Louis Riel School Division (LRSD) was not included in this study because it was participating in the pilot project (Manitoba Education, 2016b). The Division Scolaire Franco-Manitobaine (DSFM) and Frontier School Division (FSD) were also not included because their funding structure is different than other divisions, including receiving some funding from the Federal government (Manitoba Education and Training, 2015). To recruit participants, I sent letters explaining my research

study to 34 superintendents (Appendix B). Of the 34 packages sent to superintendents across Manitoba, 14 granted permission and agreed to distribute the materials, 3 declined to participate, and 17 did not respond.

The letter sent to superintendents explained the purpose, nature and methods of the study and asked their permission to distribute materials to student services administrator(s) in their division. A letter of consent was also included in the package to superintendents (Appendix C). Of the six student services administrators interviewed all received the invitation to participate (Appendix D) and the letter of consent from their superintendents (Appendix E). I received written permission from five out of six superintendents whose school divisions were represented in this study (Four signed the consent form provided to them and one indicated permission in writing via email). I did not receive any communication from one superintendent. The participant had received the invitation package from his/her superintendent. Therefore, the decision was made with my advisor to include this participant in the study. Because the superintendent had distributed the invitation and the letter of consent to the student services administrator, I presumed that this student services administrator had the permission of the superintendent to participate in the study. Communication with the superintendent after the participant agreed to participate would have compromised the confidentiality of the participant.

I maintained a written record of all recruitment and data management processes, including correspondence, so that I was able to document data trails satisfactorily when requested by thesis committee members. As with all data, I kept this data secure.

In an effort to ensure participants were informed volunteers, the invitation provided student services administrators with an outline of the study, a letter of consent and a request to

contact the researcher should they wish to participate. Six student services administrators agreed to participate. I arranged to meet with the participants at a time and place that was convenient for them. The interviews took place between May and June of 2017.

Data Collection

As participants responded to my request to interview them for this research study, I communicated with them via email to arrange a date and time to meet. Prior to starting each interview, I provided each participant with a copy of a participant consent form (Appendix E) and asked them to sign it. I reminded each participant that the interview was confidential. I also let each participant know that a final copy of the entire thesis will be sent to them upon completion. I recorded interviews on two recording devices with participants' knowledge and permission. I explained they would receive a verbatim transcript of the interview for verification prior to data analyses. I explained if there was anything in the transcript they wanted changed or omitted, they would have the opportunity to do so. Finally, I let each participant know I would assign a pseudonym to him/her to ensure anonymity and to assist myself in keeping the data straight.

The interviews were conducted at a place and at a time convenient for the student services administrator. Prior to each interview it was important to spend a few minutes establishing rapport between myself and the interviewee. Bogdan and Biklen (2007) explain that taking a few moments to break the ice and to establish some rapport between the interviewer and the interviewee is a necessary first step in the interview process. As each interview progressed it was important for myself as the researcher to follow the recommendations made by Bogdan and Biklen (2007), including to listen carefully, seek clarification, and be flexible.

At the beginning of each interview I described my research, its purpose, and the role of the interviews. My interview questions were designed to be open-ended (Appendix F). Bogdan and Biklen (2007) recommend making the interviewee feel as if he or she is an expert in the field being studied. The student services administrators are most certainly the experts in my study and I tried to honour their expertise by listening carefully to what each one had to say.

I conducted, recorded, and transcribed six semi-structured interviews. As described by Cohen et al. (2000), the interview process is one that allows the participant to discuss experiences and opinions about a topic which is of interest to him/her. After the initial introductions, each of the six interviews did in fact seem more like a conversation than an interview. The participants spoke freely and many answered some of the questions far before I had the chance to ask them. The six interviews took place over a period of approximately five weeks. I transcribed each interview within a few days and sent a copy to the participant with the request to read the typed transcript and advise me about any changes or deletions they would like to see.

Data Analysis

After each interview, I typed a verbatim transcript. I included the date, time, and pseudonym of the person who was interviewed. I followed the method of transcribing recorded interviews as described by Bogdan and Biklen (2007) in which I labeled the speakers, "I" for myself as the interviewer and the pseudonym appointed to the participant who was interviewed. Sufficient margins were kept on the transcripts so that there was room for notes during the analysis stage. After each interview was transcribed, I sent a copy to the interviewee for review.

It was during this stage that participants could have me change or edit any information they provided during the interview. One participant called me on the telephone and asked to change or expand some of his/her answers so that they were clearer. Creswell and Miller (2000) describe this as a type of member checking in which, "researchers may have participants view the raw data (e.g., transcriptions or observational field notes) and comment on their accuracy (p. 127).

After all of the interviews were conducted and each recorded interview was transcribed, I started to review the data. Each interview took approximately one hour which yielded between seven to twelve typed pages of data (single spaced, 12 font). To begin, I read through the raw data several times. Then using the interview questions as a guide, I started to write down phrases and key words from the transcripts. I wrote down the questions on separate sheets of paper and then wrote down responses from each of the participants. I also included a section entitled *other* to be sure to include comments that fell outside of the questions asked. At this time I separated urban and rural participants so that I could determine if their responses were different based on their location.

Then, I began the work of coding the data. Bogdan and Biklen (2007) explain that the first step in coding the data is to develop a coding system. This includes looking through the data for patterns and themes and developing coding categories that allow the researcher to sort and organize the data. A theme is described by Bogdan and Biklen (2007) as "a concept or theory that emerges from your data" (p. 200). I examined the data that had been separated into urban and rural responses. I then started to write down themes from each section noting which participant (using a pseudonym) said what. There was a lot of information that came out of the data and I coded it several times as I looked for all emerging themes, making sure I was not missing anything or leaving out important ideas from the transcripts. From there I was able to

order the ideas that emerged, ranging from the most common to those ideas that were only

mentioned by one participant but still might be useful in the analyses and in case they became

important points later on. I shared the data analysis section and the process with my thesis

advisor who reviewed it as a form of debriefing. Peer debriefing according to Creswell and

Miller (2000) is "the review of the data and research processes by someone who is familiar with

the research or the phenomenon being explored (p. 129). This, according to the authors,

contributes to the trustworthiness of the analysis.

Data Interpretation

Once the data coding was complete, the data interpretation process began. During this

stage, themes are developed based on the patterns identified in the data (Bogdan & Biklen,

2007). The Task Force on Special Needs Funding made it clear in their report to the Minister that

the change to formula funding was proposed as a way to improve inclusive education in

Manitoba (Manitoba Education and Training, 2015). The data from this research along with its

interpretation was examined through a lens of inclusion, seeking to answer the question: "Will

this change to formula based funding help to improve inclusive education in Manitoba?" In the

next chapter I provide a detailed analysis of the data from the interviews with the six student

services administrators who participated in this study.

Chapter 4: Findings

In this chapter I examine the responses from the interviews with the six student services administrators who participated in this study. It was evident each of these student services administrators has a deep understanding of inclusive education and they care deeply about the students, staff, and community they serve. The six participants were open and were very willing to not only answer my questions, but to share their stories. All participants were employed in divisions that would be implementing the changed funding model for the upcoming school year.

The themes that I identified from the data include: divisions had been working on improving inclusive education long before the announcement of the funding change; the roles of various divisional staff will change; divisions have begun to prepare for the change by having conversations with various stakeholders; divisions will rely on data sources like class and school profiles to organize and distribute supports; and the changed funding model could result in improved inclusive practice but there is some fear that this change may actually encourage more segregated practices to be put in place if its implementation does not go well.

Inclusive Education: A Continuation of the Journey

One idea was evident throughout the interviews with the six student services administrators. They are all extremely knowledgeable and passionate about inclusive education. Five of the six provided detailed examples of how inclusive education has already been promoted in their divisions. The one participant who did not provide details, might have had details to give, but it just did not come up during this particular interview.

In 2005 the province of Manitoba enacted the *Appropriate Educational Programming Amendment* that was designed, along with the accompanying *Regulations*, to mandate that all students in Manitoba have access to an appropriate education. The particular target was the

population of students who require more individualized content or processes. Since this regulation was passed, The Department of Education provided school divisions with various resources to improve the appropriateness of educational programming. The participants who were interviewed talked about many different ways they as divisional leaders are already working with staff to improve inclusive education.

One participant spoke about how as a division they have been talking about doing business differently for the past six years. This is well before The Task Force on Special Needs Funding was created. In this division they have allowed schools to use funds allotted through the funding application process for resources other than educational assistant (EA) time. "They could use their money for either human resources, materials, or professional development for teachers or EAs."

Another participant talked about how they have already started to use educational assistants differently and they have encouraged schools to use the principles of Universal Design for Learning (UDL) as a way to improve inclusive education in their division.

One participant talked about how as a division they changed their support model several years ago. "It was looking at support not just being educational assistants…So, it can be co teaching. It can be a social worker going in and working with the classroom on a particular program."

Another participant talked about how they have already begun to look at their service delivery in regards to clinicians. The participant said:

    I was in one class last week where there are a lot of EAL (English as an Additional

    Language) learners and a lot of the students' language was very weak; phonemic

    awareness was poor. So instead of the speech language clinician trying to pull out all of

those individual kids, she was co teaching with the classroom teacher. Together, they did

the planning; they set the environment up and the results were amazing. Absolutely

amazing.

The idea inclusive education is a journey that divisions have been on for a long time was

a common theme among participants. When asked if the change to funding might improve

inclusive education, most said it would make it better because the "detrimental funding

applications" would be eliminated. However most seemed to feel that funding is just a small

piece of inclusive education. "I think we consider our division an inclusive division and we work

long and hard to make that happen. So, I would assume that this model will just continue to

support and enhance our journey."

Changing Roles and Responsibilities

Throughout the interviews a common theme was the roles and responsibilities of various

school staff will change as a result of the new funding model. All six participants discussed roles

and responsibilities of staff changing. All six talked about the roles of educational assistants and

clinicians. Four talked about the role of the principal, and four talked about the impact the

change in funding will have on teachers. In the original literature review I talked about the

changing role of the educational assistant and the clinician under a new funding model. I also

examined literature that looks at the role of the resource teacher and the crucial role the school

principal plays in supporting inclusion. The student services administrators themselves seem to

be empowered through the change in funding.

The educational assistant.

During all six of the interviews with student services administrators the topic of

educational assistants came up repeatedly. As discussed in Chapter 2, the field of education has

misused educational assistants (EAs) since we moved from segregated settings to more inclusive environments (Giangreco et al., 2012). The research on the inappropriate use of EAs is extensive and it appears that divisions in Manitoba continue to misuse and over-rely on educational assistants. In talking with the participants, it seems that while there is agreement educational assistants have been overused and used inappropriately, they will still have an important role to play in service delivery under the new funding model. However, the EA role will probably be significantly changed.

One participant spoke about learning from EAs they have been essentially leading the programming for individual students. The participant said:

I feel really strongly that if this is going on and we know it, it is against the law. We have to make those changes and ensure that classroom teachers in collaboration with their student support team and their divisional people are working together to support the kids.

Another student services administrator talked about the misuse of EAs in high school classes to help struggling learners. The participant said:

The biggest thing that the high schools do is rely on the EAs to do the remedial, the re-teaching which I think is ethically wrong… Why would we think that the kids with the greatest learning needs would need the least formally educated person in your building?

The student services administrators seem to be aware that the use of EAs is problematic in some of their schools. It seems under the old system, most of the divisions fell into the model of: "if a child is funded Level 2 they get three hours of EA support. If they are funded Level 3 they receive six hours of EA support". The Department of Education never mandated this. It does seem, however, that the use of individual funding applications certainly perpetuated this practice. All six participants said the new formula funding model will provide them with

flexibility to use the dollars to purchase more clinicians, co teachers, or resources other than just EAs. One participant said, "I am going to use this new formula to buy fewer EAs and more professional staff."

All of the participants said the move to formula based funding will not eliminate the need for educational assistants. Divisions may require fewer educational assistants and use the ones they do employ differently but there will always be a need for educational assistants in our system. One participant said:

> The reality is that we still need some human resources. We are not going to get rid of EAs, but we can educate them, use them better…We have to educate our EAs so that they know what their role is and how they can best support that classroom.

One division is planning on implementing the new funding model into just a few of their schools as a sort of pilot in the next year (2017-18). The other schools will remain status quo as they learn from the pilot schools. The student services administrator from that division talked about changing the ways in which EAs are assigned. The administrator said:

> If we take a look at the role of the educational assistants for example, right now they are very much student specific. Next year and I will think of our pilot schools, it may not be set up like that. For example, if there is an EA in the school, the EA's assignment may be with a variety of different children.

The clinician.

All six of the student services administrators I interviewed talked about increasing the number of clinicians employed by their division and talked about their changing role. The changed role of the clinician will be a direct result of the new formula funding model. Because schools will no longer be collecting data for and writing individual funding applications,

clinicians will undoubtedly have more time to spend on service delivery. "And for all of our specialists, whether it is OT, PT, SLP, Psychology, they spend an inordinate amount of time doing assessments and the pieces they need for the funding application," said one participant.

It seems that the six participants believe having more trained professionals in schools will have direct benefits not only for students who require additional supports, but for all students. When clinicians are able to co-teach in a classroom with specific target students in mind, other students will benefit. One participant said:

It is not about having an EA. It is about having an OT to teach self-regulation. It's about having a speech language pathologist or a reading clinician doing some intensive reading and language instruction.

One participant talked about the role of the clinician and how it has already started to change. The participant said:

For example, clinicians in the past have spent a lot of time in their work doing assessments because it was required for funding applications. Well, we are going to stop that and we are only going to do it when we really need it. So we have already started to do some things: reworking the dollars, reworking people's roles and responsibilities and in the school profiles it was very clear where people were preparing for that - for example, speech and language pathologists being targeted in Kindergarten classes.

While all six participants talked about the potential positive effects of having more trained clinicians co-teaching and providing direct services to students, two identified potential barriers that may need to be addressed as services expand in this area. One barrier as described by one student services administrator is related to provincial licensing of clinicians. "I know one school has asked for their own speech language pathologist. Yes. Please do. The problem is the

whole clinician licensing gets in the way… Those are some of the structures that we actually have to break down." This participant went on to explain that the process for clinicians to obtain their school clinician certificate takes several months and school divisions are only allowed to hire a clinician with the certificate. Breaking down these barriers will be important as divisions strive to incorporate these practices, such as clinicians providing more direct service to students in their assigned schools.

Another participant talked about the idea of providing professional supports based on needs - the idea that there can be flexibility in hiring staff based on the needs of one's population. This participant talked about local teacher associations and contracts being a barrier to this practice. The participant said:

> This particular situation is going to be a term position, but we also know that two back to back terms becomes a permanent position according to the collective agreement…How do we have the flexibility to address the needs of our kids, without necessarily always having permanent staff?

These are valid questions for which no one provided black and white answers.

The teacher.

The classroom teacher has more impact on students than any other person or resource in any given classroom. It is no surprise that four participants talked about how the change to formula based funding will directly impact expectations on teachers to take increased instructional responsibility for all of their students. This change appears to be a result of divisions using educational assistants differently. Because EAs will no longer be attached to individual students, teachers will have to take ownership of all students in their class. This is

currently the law, but this, as admitted by a few of the participants, is not always current practice

and they agreed they are looking forward to this positive change. One participant said:

> When they take more ownership with our kids who are struggling learners, I think
>
> teachers will spend more time with them and then on the heels of that I think our
>
> classroom teachers will become more skilled because right now our classroom teachers
>
> are not always the ones who are working with students with severe cognitive disabilities
>
> or behaviour issues.

This sentiment that EAs have been responsible for students who require additional

learning support needs was raised by another student services administrator who said:

> Our division has always, more so at the middle and senior levels, been heavily reliant on
>
> EAs for the delivery of educational programming. This is the one thing I want to change
>
> in our division with this new formula. It is that teachers teach kids and EAs help in that
>
> process. That is a student's human right - to have access to the teacher.

One participant talked about the importance of building capacity among classroom

teachers to work with students with additional learning needs through support from the division.

Another participant talked about teachers taking on more instructional responsibility and being

able to meet these demands. "I don't think they can do it all in the way that we have traditionally

done business. They really have to change their pedagogy."

 Another participant said:

> I think my final piece will be: don't forget the classroom teacher. Some classrooms in
>
> small schools in particular or rural schools have huge numbers of kids with very
>
> significant needs and at the end of the day it only matters what happens in the classroom.
>
> So we can dream all our ideas and we can say we have all of these supports, but if we

haven't remembered what the teacher needs and we haven't served the teacher, we have

failed.

The principal.

As discussed earlier, the role of the principal is extremely important in creating and

maintaining an inclusive school. One participant talked about the important role the school

principal will play in the roll out of formula based funding. "Their work in schools is intentional

work. Talking to all staff as a whole, school plans, PD, how they build capacity within their own

buildings, how they model, going to IEP meetings, knowing every kid, being in classrooms

themselves." It is clear that the expectations the student services administrators have for

principals are very high. Another participant said:

> I think that once we unleash the demon of six hours for this kid, three hours for this
>
> kid…I mean there are some non-negotiable kids and we must address that. That is
>
> appropriate education. That is on the principal. We can provide them with all of the
>
> supports, but they must make sure that happens.

In Manitoba, the *Appropriate Educational Programming Amendment* puts the

responsibility of appropriate education on the school principal (The Public Schools Act, 2005).

The foundational assumption, it seems, is that all school principals have a deep understanding of

inclusion. As one participant from a rural division pointed out, that may not always be the case.

The participant said:

> That is my fear about giving principals autonomy. We have to all have a strong vision
>
> about what this looks like… Does the principal really believe in inclusion?... So giving
>
> autonomy to principals to allocate as needed is great, but then we need to make sure that
>
> our principals have the shared vision – a mutual understanding of what it looks like.

The student services administrator.

There was another change in roles that emerged from the data. The student services administrators themselves seem to be preparing for a change in their role that will see them working more closely with principals and teachers than with mainly clinicians and resource teachers. One participant talked about opening the lines of communication with principals. The participant said:

I would like to ask a purposeful sample of early years, middle years, and senior years (principals) – what do you know and what do you need to know? …We can't just move forward thinking everyone knows where we are going.

One participant started to have conversations with school administration on a monthly basis. "So we are always in conversations…So it is being in tune with what is happening in those schools and having those discussions." Another participant talked about involving school administrators from the beginning. The participant said:

So we started at the administrator level and we talked about all of the issues and all of the impacts and what we need to do and what it needs to look like and then mapped it out from there.

Another participant talked about helping principals learn how to use different supports rather than just educational assistants under the new funding model. "They can see the flexibility in that starting to move their people around in a much more effective way…I think that they have felt that they had to do it that way because that was the rule."

It seems the student services administrators I interviewed are changing their role to work with the principals at the school level in the area of inclusion. They also seem to feel more empowered to make some of these changes. One participant said:

I think as leaders we set the tone… Because just as they think about their students and

supporting their students I have to think how do I support the adults who support the

kids? How do I give them the tools they need?

Another participant spoke about some changes that will be a result of the change in funding. "I

am going to use the formula to buy fewer EAs and more professional staff. I am hoping to put

more resources in our schools that can provide resources to kids."

One student services administrator talked about the leadership role and how to help

people shift their thinking. The administrator said:

How are we doing the work? That is the most important and how are we serving our

kids?... That is another way that we are really trying to shift thinking and get people to be

thinking from a planning point of view, not a reactive point of view.

The student services administrators in this study seem to be looking at their own roles as leaders

and how they can best lead the change to formula funding.

Preparation for the Change: Conversations with Stakeholders

With the change in the funding formula fast approaching, the six participants all talked

about different ways they have been preparing for the change. Five out of the six student services

administrators talked about how they have communicated with parents and the community about

the change to formula based funding. Four of the participants spoke about initiating

conversations with school administrators about the upcoming change. Three of the six already

initiated conversations with the different union groups who represent teachers and EAs. Three of

the six had initial conversations with staff about the change. One participant reported there have

been conversations with the board of trustees about the change to formula funding. It is

important to note that because a participant did not mention having conversations with a

particular group of stakeholders does not mean it hasn't happened or will not happen in the future. The participants covered a lot of ground in one hour, so in all likelihood there are things they did not talk about.

Parents

Parents are the most important people in a child's life. There is lots of research on the value of schools creating positive relationships with the families of the students in their care. In Manitoba, parents are expected to be included and involved in the development of Individual Education Plans (Manitoba Education, Citizenship, and Youth, 2007). Under categorical based funding in which schools submitted an application for Level 2 or Level 3 funding in the name of a specific student, the parents (guardian) were required to sign the application before schools could submit it to the province for review. Funding applications typically included everything that was wrong with a child and nothing that was right. One participant talked about hosting a parent evening for students who have received Level 2 or Level 3 funding. She said after she was approached by a couple who were extremely happy that the funding application process was going to be eliminated. The participant said:

> [The parents] comment to me was: 'you cannot believe how happy we are that the funding application is gone.' I asked why is that and they said: 'well when we get called in and all of the people are nice and everyone tells us how wonderful our child is and so forth, but we have to write all of this stuff on a piece of paper to prove that he needs help.' They said it is just so hard to sit there and hear and read all of this stuff about their child.

The problem divisions may experience now is that, for so many years under the old deficit based model, schools actually convinced parents that their child needed support (which in

most cases equated to an EA). Five out of the six student service administrators I spoke to had some sort of communication with parents. Two sent home a letter to the parents of students who had previously received provincial funding; one hosted a parent evening; one had the information put on the divisional website; and another had school staff have intentional conversations with parents about what this change in funding will look like for their child.

Surprisingly, none of the five participants who initiated some sort of conversations with parents reported any negative feedback. One participant reflected there almost seems to be a lack of interest from parents, not only in that division, but that has been reported by colleagues from other divisions as well. The participant gave this possible explanation:

> I think they have been pretty happy. Their kids get to come to their community school; they get to meet friends; parents feel welcomed; schools have done amazing things to make sure that kids are in concerts and going to camp and just being who they are and put kids beyond what anybody ever dreamed their capabilities were…This generation of parents only know what they know. They don't know what the past was. I think they are just darned happy.

Most of the participants talked about having some sort of communication with parents about the upcoming change in funding. It appears from this limited sample, parents are accepting of the change from categorical based funding to formula based funding.

Principals.

As discussed previously in this chapter, the student services administrators who participated in this study talked a lot about the important role that the principal will play in a successful (or perhaps unsuccessful) roll out of the new formula funding model. Four of the six participants spoke about their division initiating conversations to prepare principals for this

upcoming change. Principals as leaders in a building will be expected to lead their staff through the changes. One participant said:

> I like to think I have been open and honest with principals for two years now. I have talked about it. This is coming – formula funding…I have tried to help them understand the why. Because we are moving from a medical model, a diagnostic model to where we are going to have more conversations about programming.

In one division, principals will be expected to ensure that inclusive practices are a priority in their schools. One participant said:

> So, if you have identified inclusive practices in your school as a top priority, how does it fit in with your school plan? How does it fit with people's professional growth, and how does it fit in with the [professional development] that happens in the school? The work of the principal in promoting inclusive practices that coincide with the new funding model will have to be diligent, intentional work that happens every day.

One participant spoke about providing administrators with professional development around class and school profiles. This participant said the information was very well received by the principals. The participant said:

> Principals decided they were going to do their own PLCs (professional learning communities). All of a sudden principals were asking one of the consultants if they could work with three or four of them together to learn about the class profile piece.

In providing principals with information about class and school profiles, this student services administrator helped administrators learn about their role in the process and it appears the information was welcomed.

Another participant from a division that encourages its schools to incorporate Universal Design for Learning talked about the work they have done with principals who are expected to help teachers. The participant said:

> We have asked the school principals to give the information to their classroom teachers…
> and basically what we are saying is classroom teachers are going to have to look at
> backwards design… because they are in charge of all of their students.

The expectation is it will be the school principal who will supervise and coach the teachers to more inclusive practices.

One participant talked about the importance of building relationships with school principals. "So, I am hoping to build better relationships with school principals and I am trying to do that by being transparent so that there is a level of trust because I don't believe in mandates." The four student services administrators who talked about building capacity in administrators are doing a variety of different things such as professional development, conversations, and building trust – all necessary for the leaders of schools as they lead their staff through this change.

Organizing and Distributing Supports: The Use of Data Sources

When asked how they would organize and distribute supports using the new formula funding model that will come into effect in September 2017, each of the participants talked about looking at the needs of all the students in the building, deciding what supports would be best to meet those needs, and then distributing the available supports as needed. The focus will be on programming, not needs. Each of the participants talked about shifting the focus to programming. One participant said:

> Right now they get the money generated and this is how we are going to use the money
>
> and now it will be: here is the school profile, this is what we need, and this is the money
>
> we will need to do that.

 A few of the participants talked about the shift as being a little bit like backwards planning.

Five of the participants talked about using class and school profiles as data sources to help organize and distribute supports under the new funding model. The one student services administrator who did not talk specifically about class and school profiles did talk about gathering information about student needs, but did not provide detail as to how the information will be gathered. Some of the participants referred to other data sources they might use, including Individual Education Plans (IEPs), clinician referrals, and school plans.

Class and school profiles.

Class profiles have been used as an inclusive school practice for several years. In typical class profiles, the classroom teacher is asked to identify the strengths, challenges and goals in his or her classroom (Brownlie & King, 2000). School profiles are the result of the various class profiles being compiled together. Five of the six participants talked about their intention to use class and school profiles as a way to distribute and organize supports. Two participants described how they are changing the whole school profile process. One participant said:

> We used the RTI (response to intervention) model. We haven't done it like that before, it
>
> is quite different. We completely abandoned our previous practice and started new
>
> because we thought a fresh new look would be important to give people the visual that
>
> this is a change process.

Another student services administrator also talked about changing the school profile document. They asked for input from principals, learning support (resource) teachers, and counsellors to

make sure they were not missing anything. This document was to be completed by May 15 to

give them time to organize and distribute supports. "Based on what principals in collaboration

with their student support team recommend and based on what I know, we will try to

accommodate them as best as we can," one participant said.

      One student services administrator talked about using school profiles as a sort of

backwards planning tool. This administrator said:

> So it is almost working backwards… right now they get the money generated and then
>
> decide how to use the money. Now it will be here is our school profile, this is what we
>
> need and this is the money we will need to do that.

A similar sentiment came from another participant:

> So that is where I have this school profile and I will stick to it. I will ask schools to tell
>
> me the needs in their building…It is not 'so these are my kids who misbehave and they
>
> are always in at recess.' It is 'these are the things I am doing to reduce that.'

> The school profile, it seems, will play an important role for student services

administrators in deciding what support to allocate and how much. However, it is important to

remember schools are fluid places with students moving in and out. The government decided for

the 2017-2018 school year, schools will get the same amount they received for the 2016-2017

school year. A few of the student services administrators I interviewed talked about their concern

about students who move in from other divisions. Under the old, categorical based system, if a

student moved in, the province simply transferred the money to the receiving division. That

transfer of funds will not happen anymore. It will be okay when students move away because the

division will not lose support, but what will happen when they receive a student with significant

needs and all of the dollars have already been allotted? This sentiment was expressed by one

participant:

> What happens in February or March if you have a student move into your division who
>
> has Down Syndrome or who uses a wheelchair and needs a full time EA?…I can't say
>
> here is your money and that is all you get. Then I have to go to the secretary-treasurer or
>
> to the school board and say okay, this student moved in and we have to have that kind of
>
> flexibility to meet those needs.

Another participant expressed similar concerns, but has already decided that money will be

allocated up front to schools in the beginning of the year. The participant said:

> And one of my choices was, when I looked at the money is that I could have kept a huge
>
> sum of money just in case, but I would rather see the money in the schools than just in
>
> case somebody arrives. So I have left a very small, tight budget. Maybe not enough.
>
> Maybe next year at this time I will say I have learned I need to leave more money in
>
> there.

Using class and school profiles as data sources will be important tools for student services

administrators, but it is important to remember that these profiles change from March when

divisions set their budgets and throughout the school year, particularly in transient areas.

A Return to Segregated Practices?

Another theme that came out of the data was four of the six participants talked about

being fearful the new funding model may actually encourage the return of some segregated

practices. This is contradictory of the intent of The Task Force. Manitoba Education and

Training (2015) states:

As our inclusive culture, beliefs, and attitudes have evolved, school-based systems,

structures, and practices have changed to match them. It has become increasingly

apparent that our provincial funding structure, specifically our "special needs funding," is

outdated. (p. 7)

The change from categorical based to formula based funding was intended to improve inclusive

practices. However, four of the student services administrators who were interviewed for this

study are fearful some segregated practices might return.

One participant was concerned that as divisions look at profiles and decide how to

organize and distribute supports it will be very division specific. Divisions will get to set their

own criteria. This participant voiced that this may pit divisions against each other:

Will divisions that provide more specialized programming appear more appealing?

Parents talk. In this division you get this or that and we don't get those supports at all in

this division. Do you start to get hot spots where people move to because there are more

supports? And then is that an inclusive province?

Another participant talked about the fear that while teachers are trying to sort out this new

funding model and the inclusive practices that go with it they will return to ability grouping in

their classrooms because they don't know what else to do. One participant talked about a

possible return to segregation simply because it appears cheaper. "Another worry for me is that

we can go backwards and we can go back to segregated settings. Because it is cheaper… I am

worried about that because it is cheaper to bus everybody to one place," the participant said.

Finally, one participant talked about the fear that in providing schools with fewer EAs,

they may return to having more cohorts as a way to meet the needs of students regardless of

whether there are other supports available. The participant said:

My fear is that: 'well if I am not going to get an EA for every kid, I will take my two EAs

and put them in a classroom with a group of kids'. That is my fear that there will be a

pendulum swing backwards because they don't have the resources so we will put them all

in the same place.

This participant talked about the important role senior administration will have to play to ensure

this does not happen. This participant went on to say sometimes principals give in to the teachers

and put teachers' needs over the needs of students. The role of senior administration including

student services administrators will be making sure these types of cohorts do not start popping up

in schools in their divisions. This is where education and capacity building for administrators and

teachers is going to be important as we embark on this new funding model and all that it entails.

Other Considerations

There were a few other points one or two of the participants talked about that, while not

themes, are important considerations as we move ahead with formula based funding. I mentioned

in Chapter Two of this thesis that one of the risks associated with the formula based funding

model is the role of the resource teacher must change (Manitoba Education and Training, 2015).

This sentiment was reiterated by two of the participants. One participant said it is "because some

of those learning support teachers were comfortable filling out paperwork and maybe not so

comfortable being out and working alongside teachers in classrooms." The other participant said:

There are still some resource teachers…I was thinking, not only are EAs a barrier to the

classrooms and peers and teachers, so are resource teachers. In some schools resource

teachers think they own the kids…So there is a presumed understanding that the resource

teacher owns those kids.

One suggestion this participant had was changing their title from resource teacher to learning support teacher. This, the participant explained, will allow others to view them as more of a support to teachers.

One of the participants talked about the importance the Department of Education is going to play in the successful roll out of this funding model. This participant believes the student services branch and the program/curriculum branch need to get together and start talking about continuous improvement for all. "That is where we need…if I was going to dream big, we need program and student services working together … in their messaging and in their work," the participant said.

In summary, the themes that came from the interviews with six student services administrators include: divisions have been working on inclusion for many years; there will be changes in the roles and responsibilities of staff; divisions have begun to prepare for the funding change by having conversations with parents and administrators; divisions will use class and school profiles to collect data to help organize and distribute supports; and there is a fear that the move towards formula funding could cause some segregated practices to return.

In the next section of this paper I provide an analysis of the findings. Areas of further research and recommendations are outlined to assist school divisions in successfully rolling out this new formula funding model through the lens of inclusive education.

Chapter 5: Moving Forward with Formula Based Funding

In this study I set out to gain the perspectives of student services administrators in regards to Manitoba's upcoming change from categorical based funding to formula based funding in an effort to provide insight to educators as to how this new funding model might impact inclusive education. In this chapter I will present a discussion of the findings and compare it to the literature research on inclusive education. I will conclude the chapter with recommendations based on the findings from this study.

Discussion

From the findings there were no distinctions specific only to rural or urban divisions. This means, that in this particular sample of student services administrators, there were no issues or concerns addressed by only rural or only urban school divisions. It is important to remember only six student services administrators were interviewed so therefore only a handful of Manitoba divisions are represented in this study. Below is a discussion based on the findings from the data analyses section of this paper.

Formula Based Funding: A Welcome Change

Each of the student services administrators seemed hopeful the change from categorical based funding to formula based funding will be a positive change and enhance inclusive education in the province. Inclusive Education has been encouraged in Manitoba since 2001. In 2005, Manitoba Education mandated appropriate educational practices through the *Appropriate Educational Programming Amendment* to the *Public Schools Act*. Since that time Manitoba Education has published many support documents to assist divisions in creating inclusive schools for all of their diverse students. Five of the six participants spoke about the many different inclusive practices that are being used in their divisions. All five talked about their divisions

being on this journey for several years. Participants reported that school divisions have been

working towards inclusion for many years prior to the completion of The Task Force Report

(Manitoba Education and Training, 2015).

In their report to the Minister, The Task Force made the recommendation to change the

way in which Manitoba funds the education of students living with special needs. The Task

Force recommended the province eliminate the categorical based system and replace it with a

formula based system. These recommendations were based on the belief that "[as] our inclusive

culture, beliefs, and attitudes have evolved, school-based systems, structures, and practices have

changed to match them. It is increasingly apparent that our provincial funding structure,

specifically our 'special needs funding' is outdated" (Manitoba Education and Training, 2015, p.

7). Categorical based funding is based on a medical model or a deficit model. Under categorical

based funding schools looked at everything that was wrong with a student. As schools have

evolved in inclusive practices, a formula based model appears to be a much better fit with beliefs

about diversity and inclusion. Instead of necessarily looking at what is wrong with the student,

formula based funding could allow educators to look at the environment to ensure the proper

supports are put into place so all students can be successful.

The student services administrators who participated in this study talked about the on-

going improvements their divisions have made in the area of inclusion. As one division started to

make changes to the way in which resources are distributed six years ago, they first discussed the

situation among key divisional staff. This group included administrators, resource teachers, and

clinicians. One participant said, "We talked about Manitoba's inclusion policy, our own

philosophy as a school division, and what other ways we could support students other than

(assigning) EAs."

Talking about beliefs is important in a collaborative culture and a necessary first step when a group is going to embark on a change of how things are done. Leithwood (2010) studied schools finding success in closing the gap between diverse students. He found the administration in these successful schools started the work by having their staff examine their visions and beliefs about student learning and then subsequently using these visions to guide all of the work going forward.

Each of the student services administrators seemed to be happy there will be a change to the funding process. One participant said, "I really do like the idea of having money and being able to meet the needs of our students in the school settings. I do applaud the government for going in that direction." Another student services administrator said:

I like to think that we are pretty good in our division for supporting kids in the way that they need to be supported but I think this will make it easier for us. It totally takes away that funding application that is so detrimental and then once a school has worked on that piece it is like the child is forever marked…I think that things like UDL (universal design for learning), formula funding, and changing some of those systems and structures is really the beginning of doing all that.

Another participant talked about the work done with staff leading up to the change to formula based funding. The participant said:

They (the school teams) are not 'awfulizing', saying that they have so many kids with needs, but rather they are looking at the learning profiles of the children. 'What do we truly need?' …doing the planning for kids rather than the 'awfulizing'. I think the potential of that is tremendous.

The change to formula based funding is a welcome change and it seems the student services administrators see it as removal of a barrier that was the funding application system. It is important to remember funding is just a small piece in the bigger puzzle of inclusive education. From the interviews it seems some divisions had been working hard to improve inclusive education for their diverse students well before the province announced the change to formula based funding. The change in funding has the potential to remove some barriers but in the end there are many other factors that need to be implemented in order for divisions and schools to be truly inclusive.

Preparation for change.

All of the student services administrators I interviewed talked about the different ways they are helping to prepare their divisions and the community they serve for the change in funding. In the following sections I discuss some of these findings and compare them to the literature.

Conversations with stakeholders.

In Manitoba, there are several stakeholders involved in public education. School Boards, local communities, parents, and educators are all important stakeholders. It is important each of these groups are educated about the change to formula funding including why the change was necessary and how it can best be implemented in our schools.

School boards.

Manitoba school divisions are funded by the province and by local tax payers. Each school board is comprised of local, elected school trustees who determine policy and the division of funding to its schools. So, school boards, including school trustees and senior administration (superintendents, secretary-treasurers) are important stakeholders who need to understand

important changes such as formula based funding. Furthermore, school trustees in particular represent the community in which they are elected. School divisions need to communicate with the taxpayers about the change to formula based funding and why this can be a positive and welcome change in Manitoba schools.

Parents.

Parents are the most important person in a child's life. It is important for school divisions to communicate with parents, particularly those who have children who live with special needs. For many years in Manitoba, school divisions wrote funding applications for level two or level three funding and in many instances convinced parents that their child needed an educational assistant. Five out of six interviewees had already initiated some form of communication regarding the funding change with parents and community members. Two divisions sent a letter home, two had parent/community information evenings, and one division updated information about the change on the divisional website.

What exactly will change for parents of students who live with special needs because of the change to formula based funding? Parents will no longer have to read and sign off on a funding application. While this is seen as a positive by many, some parents might be wondering how schools will be accountable to meet the learning needs of their child. Schools will continue to be responsible to meet the needs of children who previously had provincial funding. This cannot change. It is essential the processes that took place in previous years continue to occur. These processes include such things as intake meetings when a child starts school or transfers to a new school and individualized education planning meetings with parent involvement (Manitoba Education, 2010).

Possibly the most difficult change for many parents of students who live with special needs will be the changing role of the educational assistant. All of the interviewees talked about how the role of the educational assistant will change under formula based funding. Historically the province did not intend for level two and level three funding to equate to EA support but that is what developed across the province. The funding application is likely largely responsible for statements such as, "my EA" or "that EA belongs to my child". Many parents, it seems, are convinced the most important person involved with their child at school is the educational assistant. Divisions have work to do. Parents need to be educated about a changing service delivery model and be made aware of the redefined roles of the different staff who may support their child.

This finding is consistent with the results of one study that looked at parents' perceptions of educational assistants. Gessler-Werts, Harris, Young-Tillery, and Roark (2004) present ideas as to how school divisions may choose to educate parents about the role of educational assistants in inclusive schools. This study found the more severe the disability, the less communication a parent had with the classroom teacher and the more communication that parent had with the educational assistant. The parents of students with less significant disabilities had more communication with classroom teachers than with educational assistants. School divisions must create inclusive policy that puts the responsibility for all students on classroom teachers and then provide those classroom teachers with necessary supports, resources, and training to do the job effectively.

Schools and school divisions need to collaborate effectively with parents to create trusting, positive relationships with them as this will help in the success of the students. Parents want what is best for their children and I would argue professionals working in schools want the

best for their students. Rodriguez, Blatz, and Elbaum (2014) looked at parents of children living

with special needs and their views about how schools include them and provide services to their

children. According to the authors, parents will be most satisfied when they are asked for input

and participation and when they believe their child is making progress and that progress has been

communicated to them. In other words, parents want to be involved and they want their children

to do well.

        Principals.

        The student services administrators who participated in this study believe principals must

understand inclusive education and what the change to formula based funding means for students

living with special needs because it will be the principals who will be called upon to lead the

change. Four of the six student services administrators who participated in this study indicated

they had included principals in conversations about the change in funding early on. Principals are

in schools every day working alongside staff. They are the ones named in the *Appropriate*

Educational Programming Regulation from the Public Schools Act (2005), and it is their

responsibility to ensure all students are receiving appropriate supports. Therefore, principals

must understand what inclusion is and is not, and they must lead staff in the creation of more

inclusive school cultures. "Leaders, and especially principals, are unilaterally able to mobilize

support for inclusion, and implement inclusive practices, and monitor teachers' efforts toward

successful implementation" (Edmunds et al., 2009, p. 1). One study out of Ontario examined the

impact a school principal has on the creation of an inclusive culture. The authors discuss the

importance of principals in: understanding inclusive practice; advocating for and providing

professional development for all staff, including the principal; the importance of identifying

positive attitudes towards inclusion and calling out any negative attitudes that may exist within a

school culture; and creating a positive school climate that celebrates and values diversity

(Edmunds et al., 2009).

One student services administrator interviewed in this study expressed concern some

principals in that division may not have the capacity to lead in the area of inclusion. If that is the

general case, then it seems student services administrators and senior administration need to

ensure principals are provided with professional development training in this area. Furthermore,

divisions should evaluate their own hiring practices of vice principals and principals. Senior

administration must probe to determine the candidate's level of understanding of inclusive

practices and their ability in leading an inclusive school culture. In this climate of inclusive

school reform, candidates who do not believe in inclusion and demonstrate a deep understanding

of what that really looks like should not be considered as leaders of schools.

Organizing and distributing supports: the use of data sources.

Student services administrators responsible for determining and distributing supports will

need to develop systems to ensure they understand the needs in the schools and have appropriate

supports in place. School divisions have different systems for collecting data. Some of the

student services administrators I interviewed in this study spoke about the ways in which they

will collect data from their schools and how this data might translate into support. Five out of six

student services administrators said they will use class and school profiles to determine how to

distribute supports to meet the needs of the diverse learners in their school divisions.

Class and school profiles.

In chapter two of this study I examined the literature that looked at the use of class

profiles as a way to meet the needs of all diverse learners in a classroom. Much of the work

around class profiles or reviews comes from Brownlie and King (2000). It seems the divisions

represented in this study are familiar with class profiles and they are used in their schools as a

method of determining need and the distribution of supports.

One of the fears about moving to a formula based funding model is that there is a

reduction in accountability to meet the needs of students with special needs (Manitoba Education

and Training, 2015). Under the categorical based system, funding was approved by the province

based on a funding application that met the criteria for level two or three funding (Manitoba

Education, 2016c). The funding was nominally attached to the student whose name was on the

application and, generally that student received some overtly recognizable support. There will

not be any funding applications under formula based funding. Therefore, even with a change in

the funding process, school divisions must have some means to determine what the school needs

so they are able to distribute supports accordingly. One participant talked about how this new

process of determining supports will be a little like backwards planning. "Here is your class

profile, here is your school profile… this is what we need and this is the money we will need to

do that," the participant said. Before, under categorical based funding, the money was received

and then it was decided how supports would be implemented. It seems that the formula based

funding model has the potential to really allow schools to meet the needs of diverse learners in

ways that are truly supportive and cognizant of needs. Some examples include hiring more

clinicians or reading teachers, or purchasing more assistive technology as ways to help students

who live with special needs have successful learning experiences.

One student service administrator talked about having student services consultants

working with schools to see how they can best meet the needs of all learners. The participant

said, "Getting people involved and making sure that they have gone back to their class profiles.

Have they really shifted resources around? That will be the work of the consultants. To get in

schools and really dig around to see." The exciting part of this new process according to this participant is that resource teachers will be able to use the time they previously dedicated to funding applications to provide direct service to students.

Once class profiles are done, school teams can create a school profile. Student services administrators will have to develop systems to gather this information from the schools in order to see the bigger divisional picture. Some of the participants interviewed talked about using school profiles to determine need and support, but did not really expand past that. As the province implements formula based funding, divisions will have to come up with systems and processes to ensure that plans are in place so that all students have their learning needs met.

Changing roles.

In chapter two of this study, I examined the literature that looked at the roles of the principal, the resource teacher, and the classroom teacher and how they would be affected by the change to formula funding. In chapter two I also examined the literature that looked at the roles of the school clinician and the educational assistant. All six of the student services administrators who participated in this study believe the roles of the school clinician and the educational assistant will be affected by the change to formula based funding. Four of the six believe teachers will have to change their practice and four believe principals will be called upon to lead the change.

As stated in the previous section on using class and school profiles, formula based funding allows schools to look at the needs of their students and design plans and implement strategies based on what is best for student learning. Schools and divisions will have some freedom to implement new, creative ideas that were not always possible under the old categorical

funding model. Schools may hire SLPs to work in kindergarten classes or a school with a large Indigenous population may choose to hire an elder to help meet the needs of its students. This was possible before under the old system, but it seems that having funding attached to individual students created constraints that were difficult to ignore.

   The educational assistant.

   The role of the educational assistant came up several times during the interviews. In chapter two of this study I examined some of the literature that speaks to the misuse of educational assistants in education. All six student services administrators spoke about how important it will be to change the role of the educational assistant as divisions implement formula based funding. They all agreed their divisions will continue to employ educational assistants, but they will likely employ fewer and assign them differently. While the Manitoba Education never mandated that schools employ educational assistants when a student received level two or level three funding (Manitoba Education, 2016c), it seems the individualized funding application process encouraged this practice. It is very important to note here the criticisms of the roles of educational assistants both in this study and in the research are not criticisms of the educational assistants themselves. The criticism is our system has misused and over relied on educational assistants in providing services to children living with special needs. Most often the people employed as educational assistants in our schools are warm, caring individuals who want the best for the children with whom they have been assigned to work.

   One barrier to inclusive education has been the merge between regular education and special education. "For too long efforts to advance inclusive education have attempted to retrofit existing service delivery models that were not initially intended to accommodate the range of student diversity currently present in public schools" (Giangreco, 2010, p. 344). In order to do

inclusion well, school divisions are going to have to change their service delivery models to meet the needs of their diverse learners. The role of the educational assistant must be clearly defined in the service delivery model. While the six study participants talked about reducing the number of educational assistants they employ, Giangreco (2010) warns that schools must ensure they have different resources available when reducing educational assistants. Otherwise there will simply be a void in the support system.

Manitoba's support document on the resource teacher role outlines a variety of service delivery models that support Manitoba's philosophy of inclusion (Manitoba Education and Advanced Learning, 2014). School divisions are able to choose the service delivery model (or a combination of service delivery models) that best suits the needs of their schools. The four service delivery models are: the consultative – collaborative model; the co-teaching model; the response to intervention model; and the universal design model (Manitoba Education and Advanced Learning, 2014, p. 4). As divisions continue to grow in the area of inclusion and move from categorical based funding to formula based funding, it will be important for divisions to clearly define the roles of all staff in their service delivery models. The role of the educational assistant needs to be defined, but so does the role of the classroom teacher, the clinician, the principal, and the resource teacher (Giangreco, 2010).

How will divisions be able to benefit from the use of educational assistants but in such a way that they are not a barrier to inclusive education? Manitoba Education (2009) outlines the role of the educational assistant saying, "An educational assistant is a person hired to support the work of professional staff, such as teachers or clinicians" (p. 3). The keyword here is support. So, how might divisions start to change the ways in which they use educational assistants? Stockall (2014) discusses the lack of training that educational assistants receive. She proposes

that the most effective way schools can improve the effectiveness of educational assistants is to use a direct instruction training model (DITM). The idea here is a resource teacher will work with an educational assistant through a variety of steps and "side by side" coaching. The steps are: establish training goals; instruction; demonstration; guided practice; observation of independent practice; and performance feedback. When educational assistants are coached individually by expert teachers, Stockall (2014) believes they will learn how to better assist students in developing both independence and self-advocacy skills while providing students with more time to participate in actual instruction with classroom teachers. "Students with disabilities need and deserve instruction from highly qualified teachers and highly qualified paraprofessionals" (Stockall, 2014, p. 204). The idea of providing educational assistants with this type of intentional training is one divisions should consider moving forward. The required time could come from the time resource teachers and clinicians previously spent on funding applications.

Much of the research surrounding the use of educational assistants cautions against assigning an educational assistant to work one on one with a student (Katz, 2013; Giangreco et al., 2012; Giangreco, 2010; Causton-Theoharis, 2009). There are times when it may be necessary to assign an EA to a particular student, but it is important this is only a short term solution with the goal being independence or fading to more natural support from others in the environment, such as the classroom teacher or fellow students. School teams must clearly outline how students are to be supported. The support must include the following components: plan to include; ask and listen; step back; and plan to fade the support (Causton-Theoharis, 2009). Educational assistants need to be taught how to provide necessary supports and pull back as the student demonstrates readiness (Causton-Theoharis, 2009).

As divisions embark on the new formula based funding model, the work they do with educational assistants and those supervising them must be intentional. Roles of all staff must be defined and educational assistants must understand exactly what their role is when working in classrooms. Those supervising educational assistants, including classroom teachers, must learn the roles of educational assistants and receive professional development in best practices in utilizing educational assistants in inclusive schools. Parents, particularly those who have children who live with special needs, will also need to understand the role all staff, including educational assistants, play in the education of their children. More research and work needs to be done in this area. The change to formula funding seems to have sparked many conversations regarding the role of the educational assistant, so this is an opportune time to start examining the potential of their work in inclusive schools.

The clinician.

Like the educational assistant, the role of the school clinician came up in all six interviews with the student services administrators. There were two main sub-themes in regards to school clinicians. The first was that all six of the student services administrators talked about hiring more clinicians under the new formula funding model. The second was the roles and responsibilities of the clinician will likely change as there will no longer be assessments for funding applications for clinicians to complete.

All six of the student services administrators I interviewed talked about using the money they will receive from formula based funding to hire more clinical staff for their schools. This will come at the cost of educational assistants but there seems to be agreement that having more professional staff available to work in schools will benefit students. In Manitoba there are six clinician classifications recognized and eligible to work in Manitoba schools. According to the

Department's website under Clinician Applications they are: school psychologists; occupational therapists; physiotherapists, social workers; audiology/speech language pathology; and reading clinicians (Manitoba Education and Training, 2017b). To qualify for permanent licencing to work in Manitoba schools, clinicians must hold the appropriate degrees or qualifications as outlined by the individual colleges to which they belong. As well clinicians must have two years of supervised experience working in school settings, complete the course, *Legal and Administrative Aspects of School Clinicians* (offered at the University of Manitoba), and must be recommended by a superintendent. A provisional certificate may be held while these requirements are being met (Manitoba Education and Training, 2017b).

If the interviewees are correct, under the new formula based funding model the role of the school clinician will change. The most significant reason for this change is because so much of the time clinicians spent in their jobs was used to assist schools in writing funding applications for students. One participant stated this changing reality: "Clinicians in the past have spent a lot of time doing assessments because it was required for funding applications. Well we are going to stop that and we are only going to do [assessments] when we really need to." So, how can school divisions help school clinicians make the shift from primarily assessment based to one in which they provide more direct services to students in classrooms? As previously stated, roles of all team members must be clearly defined, including the role of the school clinician.

The transition from a categorical based funding model to a formula based model might force educators and clinicians to look at student diversity with a different lens. Manitoba's categorical based funding was based significantly on a medical model. Professionals working in schools with children who presented with special learning needs looked at what was wrong with the child. In contrast, formula based funding might enable educators including clinicians to

examine the learning environment and ask themselves what supports are needed to help students be successful.

Archibald (2017) reviewed 49 papers that looked at the service delivery of speech language pathologists (SLPs) in schools to assist them in deciding which service delivery model is most effective. The author states these findings must be interpreted with caution because there were a limited number of studies conducted in the different areas of SLP services. According to Archibald, providing students with in-class services means that targeted students will not be pulled out so they will not miss valuable instruction time. Another argument is SLPs have found students with communication disorders do not always transfer learned skills from clinic to environment. Some argue teaching language skills directly in a natural environment such as the classroom will improve outcomes for students with communication disorders.

Another argument for having SLPs co-teach in classrooms alongside classroom teachers is it allows them to reach more students (Archibald, 2017). Often clinician waitlists are quite long and not all students receive services. The co-teaching model could result in improvements in communication for many students, not just a select few.

Archibald (2017) reviewed research that examined some of the different areas that fall under the umbrella of SLP services. These areas are: oral language; phonological awareness; curriculum-based language; and writing. The author concludes, "There is compelling evidence that targeted vocabulary and phonological awareness can be effectively taught through SLP-educator collaboration in the classroom" (Archibald, 2017, p. 14). There was not sufficient evidence that demonstrated the effectiveness in the other areas when comparing the co-teaching model to the pull-out model and it seems more research is needed in these areas.

It will be important for school teams to decide on a service delivery model and define the

role of the various school clinicians. Collaboration among all members of a school team will be

vital in providing services to students to best meet their needs while being as inclusive as

possible. One case study examined a SLP who effectively co-taught in classrooms to meet the

needs of students with diverse language needs. Ritzman et al. (2006) state:

> The combination of strategies utilized by this SLP provides supportive evidence that her
>
> collaborative practices and classroom-based service delivery methods meet students'
>
> needs in the least restrictive environment, as mandated by the Individuals with
>
> Disabilities Education Act (IDEA) Amendments of 1997. (p. 230)

The idea of push-in services as opposed to pull-out services is certainly more inclusive and more

in line with the research on inclusive practices.

School divisions will have to intentionally create professional development for school

clinicians if they will be asking them to change their practice. The focus of this professional

development should be on in-class service delivery and how to effectively co-teach with

classroom teachers. Classroom teachers also need to be trained to use the co-teaching model in

their classrooms. Student services administrators and principals should provide time for

collaboration among teaching and clinical staff if the expectation is to have them work alongside

each other in classrooms. Professional development in this area is going to be imperative moving

forward. Simply "telling" clinicians and teachers to work together likely will not work and will

come at a cost of disservice to students.

The principal.

In regards to the role of the school principal, two main sub-themes came up several times

during the interviews. The first is the student services administrators are counting on school

principals to lead the change as their divisions move to formula based funding. The second is the
participants believe the school principal must have a strong understanding of inclusion if the
change in funding is going to be successful. One participant stated:

> Does the principal really believe in inclusion...that really deep understanding of what
> inclusion is? So giving autonomy to principals to allocate as needed is great, but then we
> need to make sure that our principals have the shared vision - a deep understanding of
> what it looks like.

The *Appropriate Educational Programming Amendment* to the *Public Schools Act* made
appropriate education law in Manitoba (The Public Schools Act, 2005). Principals must
understand this regulation and how it serves as a basis for inclusive education. Zaretsky (2010)
studied Northern Manitoba principals in regards to the appropriate education amendment that put
much of the responsibility for appropriate education on the school principal. Zaretsky found
there were four enabling conditions that support principals in their work to ensure appropriate
education happens in their schools. The four conditions Zaretsky (2010) found are:

1. A commitment to changes in current educational practices;

2. A positive attitude to the inclusion of all students within the community
   school;

3. Attendance at meaningful PD in order to learn about all aspects of
   appropriate educational programming from an administrator perspective; and

4. Flexibility to adapt to changing legislated requirements. (p. 245)

School divisions might want to consider using Zaretsky's (2010) study of the work of the
principal and *Appropriate Educational Programming Amendment* to the *Public Schools Act* (The
Public Schools Act, 2005) to start the conversation about appropriate education with principals.

A solid understanding of appropriate educational programming serves as the essential first step in adopting current, research based, inclusive practices in Manitoba schools. As school divisions expect principals to lead the change in inclusive education that will result from the change to formula based funding, they must also ensure the four conditions described by Zaretsky (2010) are established. If principals and other school leaders do not have a solid understanding of appropriate education, inclusive education simply cannot happen.

Further to the *Appropriate Educational Programming Regulation* in The Public Schools Act (2005), divisions will need to ensure those who are working as the leaders in their schools understand inclusion and are ready to lead in an inclusive school. McLeskey and Waldron (2015) looked at successful inclusive schools and found schools with administrators who were willing and able to work with the school staff to create shared core beliefs and values surrounding inclusion were successful in creating and maintaining inclusive schools. Hoppey and McLeskey (2013) examined some of the research looking at principals who led successful, inclusive schools and found that "[research] has identified the school principal as a key participant in directing school change and creating schools that support teachers to meet the needs of all students" (p. 245).

Four of the six participants talked about how their divisions have already started to engage principals in conversations around inclusion and the new funding model and it seems the majority feel that the school principals are capable of leading this work. There seems to be some concerns in one division that principals are not ready to lead schools through this change. One participant said:

It is not about your teachers' needs; it is about your students' needs. And principals

sometimes do that, depending on what type of principal they are and the leadership

(skills) that they have. Sometimes they do put the teachers' needs before the students'

needs. That is a problem.

It is going to be very important for divisional leaders to ensure principals have the understanding

and the tools they need to facilitate this change and to ensure school is as inclusive as possible

for all learners.

The resource teacher.

In chapter two I examined the literature surrounding the role the resource teacher plays in

inclusive schools. In their report The Task Force outlined four risks associated with formula

based funding and one of those risks was the role of the resource teacher will change in

Manitoba schools (Manitoba Education and Training, 2015). While this statement may have

some truth to it, the role of the resource teacher does need to change if Manitoba schools are to

be truly inclusive. One participant talked about how, perhaps, some resource teachers are

comfortable filling out paperwork in an office and may be not so comfortable working in

classrooms alongside teachers. If that is the case, then it is up to the principal and the student

services administrators to provide professional development opportunities and supervision for

resource teachers to learn and acquire the skills necessary to shift their roles to be coaches,

mentors, and co-teachers with classroom teachers. Like classroom teachers, resource teachers

may also need professional development that addresses their attitudes towards the education of

students with disabilities and their attitudes towards inclusive education.

As stated previously, school divisions need to create service delivery models and ensure the role of all members of the team, including the resource teacher, are clearly outlined and defined. Resource teachers are knowledgeable about special education and working with students who have additional learning needs (Katz, 2013). They are able to perform assessments and design individualized learning goals for students. Their work is vital as we move forward under formula based funding. Inclusive education does not mean that practices such as assessments and individual education plans (IEPs) are no longer necessary. These practices must continue or else we run the risk of students not having their needs met. These practices must take place in the context of inclusive classrooms. Resource teachers who are the specialists with disability and classroom teachers who are the specialists with curriculum must come together to create an inclusive environment that meets the needs of all diverse learners (Katz, 2013).

In chapter two, I examined the document, *Supporting Inclusive Schools: A Handbook for Resource Teachers in Manitoba Schools* (Manitoba Education and Advanced Learning, 2014). This document outlines Manitoba Education's perspective on what the role of a resource teacher can and should look like. The majority of the work a resource teacher does should be working with classroom teachers to assist the classroom teacher to meet the learning needs of all of the diverse students in his/her class. The document goes on to recommend the support might be co-teaching, consulting, co-planning, or a combination of all of these methods. "When the primary role of the resource teacher in an inclusive school environment focuses on supporting and working with classroom teachers, all students benefit" (Manitoba Education and Advanced Learning, 2014, p. 13). Other aspects of a resource teacher's job may include the management of educational assistants, leadership within the school, and student support (Manitoba Education and Advanced Learning, 2014).

This changing role of the resource teacher is one the school principal must understand and support. Katz (2013) describes the new role of the resource teacher as a "collaborator and a teacher leader" (p. 21). Classroom teachers cannot be expected to teach using inclusive practices if they have never done so before. Some of the participants in this study talked about how classrooms teachers are not able to "do it all" the way they have been doing, and if they are to be more inclusive, teachers are going to have to change their pedagogy. Principals must help create school service delivery teams and insist resource teachers work collaboratively with teachers and are working in classrooms coaching and/or co-teaching (AuCoin & Porter, 2013). This modelling and support resource teachers will provide to classroom teachers will be essential in building the capacity of our classroom teachers.

The classroom teacher.

The most influential person in any given classroom is the classroom teacher. Two sub-themes surrounding teachers emerged from the data. The first is classroom teachers have to change their pedagogy as divisions move towards formula based funding. The second is school divisions have to provide professional development and capacity building opportunities if teachers are expected to teach in more inclusive ways.

All six of the student services administrators talked about reducing the number of educational assistants they employ and using those dollars to hire professional staff which might include clinicians and teachers. As the new funding model rolls out, teachers will be expected to take instructional responsibility for all students. It was never the intention for educational assistants to have more charge over students than classroom teachers. Some of the student services administrators I spoke to alluded to the fact that, while this was never the intention, in some instances it has been the practice. One student services administrator talked about how the

change to formula based funding may help in this area. "The other thing I see happening a little bit more organically is that classroom teachers will take more ownership for the students who are struggling learners and educational assistants might spend more time with neuro-typical kids," the participant said.

In order for teachers to meet the needs of diverse learners they have to examine their teaching practice. Gone are the days of teaching to the middle. Teachers in today's classrooms must design the learning with the needs of all students in mind from the beginning (Katz, 2012). Education in the Manitoba context is shifting from exclusion, to integration, to inclusion. I believe it is safe to assume different school divisions, schools, and classrooms vary in where they lie on this continuum. It is important to remember Manitoba Education believes that inclusion is best practice. The question is: how can teachers effectively meet the needs of very diverse learners in their classrooms?

Hehir et al. (2016) report, "Implementing effective inclusive education may require teachers and principals to rethink many longstanding approaches to instruction" (p. 19). One of the biggest barriers towards inclusive education according to the authors is teachers' attitudes towards inclusion. To combat these attitudes and move in a positive direction, the authors suggest that teachers and principals will have to be given time and opportunity to examine how these attitudes came to be and to see effective inclusion in practice.

How can school leaders including student services administrators and school principals work towards changing the attitudes of teachers toward inclusion? Changing attitudes is never an easy task. Much of the literature looking at teachers' attitudes towards inclusion claim that while teachers believe in inclusion in terms of it being a human right, many feel that they do not possess the knowledge and skills to teach students with disabilities (Hehir et al., 2016;

McCrimmon, 2015; Sokal, 2012; Florian & Linklater, 2010). It is imperative school leaders focus on building capacity within their teaching staff to teach in inclusive classrooms. School leaders must work towards creating collaborative communities of teachers and staff who work together to create inclusive settings for all.

There is some research that looks at pre-service teachers and how to assist them to acquire the skills and attitudes necessary to teach in inclusive classrooms. I believe many of the ideas from this body of literature can be used by school leaders for veteran teachers who have been teaching for several years. What is good for teacher candidates and new teachers certainly can be valuable for veteran teachers. One Manitoba study, written by Sokal (2012), looked at what various staff members including student services administrators, principals, teachers, clinicians, and educational assistants believe are essential skills and attitudes that new teachers should possess to teach effectively in inclusive schools. The author determined other staff members believe that being flexible about process is a necessary skill as every situation is different in its own context (Sokal, 2012). Inter-dependence, or being able to work effectively with other members of a collaborative team, was another skill the participants believed were necessary for new teachers to have. The third skill according to the researcher was new teachers must be able to communicate well with others about student needs. The final finding of Sokal's 2012 study was the participants believed new teachers must be able to ask for help when they need it and possess a "growth seeking attitude" (p. 414). It seems to me these skills and attitudes should not be required from only new teachers. Many veteran teachers have never had any training specific to students with disabilities or inclusive practices. Providing professional development around these four findings would likely be effective for all members of a school staff.

School leaders need to be specific and intentional in the message they send to staff. Katz (2012) recommends that school leaders adopt an inclusive policy and mean it by not allowing there to be any exceptions. While, policies are important, it is essential to remember teachers need to be supported in their professional learning.

One method of inclusive teaching in classrooms is Universal Design for Learning (UDL). Hehir et al. (2016) report teachers must learn inclusive techniques so that diverse students can be successful and UDL has been found to be successful in improving the way inclusion is implemented in schools.

An extension of UDL is The Three Block Model of Universal Design for Learning (Katz, 2014). This model has been implemented in many classrooms, schools and divisions across Manitoba with success. "UDL focuses on a strengths-based approach not only to persons with disabilities, but also to all learners and thus can be viewed as an inclusive educational reform" (Katz, 2014, p. 3). The Three Block Model of UDL consists of three parts: Social and Emotional Learning; Inclusive Instructional Practices; and Systems and Structures (Katz, 2012). Some of the student services administrators interviewed in this study talked about classroom teachers changing their pedagogy. This model provides teachers with a way to teach all of their diverse learners in their classrooms by designing the learning and the outcomes for everyone from the start. To start, the social and emotional needs of students are addressed through intentional lessons. Students learn about and talk about their learning strengths. Class meetings help to create a democratic classroom so that each student feels that they belong and that they have something important to contribute. Inclusive instructional practices include such things as the multiple intelligences, inquiry learning, integrated curriculum, and backwards planning to meet the needs of all learners in a classroom. I have personally used the Three Block Model of

Universal Design for Learning in my practice and have found it to be a practical and simple

method to use to meet the needs of diverse students. This finding was also reported by Katz

(2014) in her study of the implementation of The Three Block Model that looked at teachers'

perceptions of instructional practice, self-efficacy, and job satisfaction. The findings from this

study, while limited, found that implementing the Three Block Model of UDL had a "positive

effect on teachers' willingness to change instructional practices, reflect on what had or had not

been working for them and reduced teacher stress/increased job satisfaction" (Katz, 2014, p. 14).

The idea that inclusive education is for all and not just for those labelled with disabilities

is crucial as Manitoba continues to evolve in the area of inclusive education. Inclusive education

practices therefore are not different or "special". They are simply good teaching practices that

may need to be more intensified for some students (Sokal, 2012). The Response to Intervention

(RTI) model should be considered as schools move towards more inclusive practices. In Tier

one, all students are provided access to the curriculum through research based practices and

pedagogy that benefit all learners. All learners are included and teachers should be continually

assessing student need to determine if Tier two or three interventions are required (Manitoba

Education and Advanced Learning, 2014).

Building the capacity of classroom teachers is essential in building inclusive schools.

This is best accomplished through a collaborative approach in which teachers, administrators,

resource teachers, clinicians, and parents all work together as a team.

The student services administrator.

One theme that emerged from the data was the student services administrators seem to feel

more empowered to make changes with the implementation of formula based funding. Each of

the student services administrators seems to have an inclusive belief system and really want to do

what is best for kids. I sensed an excitement from all six participants that this move to formula funding is allowing divisions to change the way in which inclusion is done in their schools. For instance, as stated previously, the province of Manitoba never mandated funding equals educational assistants. The elimination of the funding application process seems to be enabling student services administrators to provide supports that are more in line with good inclusive practices.

School division leaders including superintendents and student services administrators must assist the school board to create divisional policy in the area of inclusion. Inclusive education should not be a merge of regular and special education, but rather its own entity, based on research supported practices that are designed to meet the needs of diverse learners (Giangreco, 2010). Katz (2012) believes that "[a] division that is truly dedicated to inclusive education will close down segregated classes and provide support through professional development, public education, budgeting, staffing, and resources to make inclusive education work" (p. 166).

Will there be an impact on inclusive education?

"You have to have faith in humanity. Where they begin to realize that there is a place for everyone in this world… our kids who are living and breathing, shoulder to shoulder with all of the kids in their class. It helps them to be kinder, gentler people who appreciate diversity far greater than my generation and that is a good thing." (Participant)

For the most part the student services administrators who participated in this study seem to believe the move away from categorical based funding which includes the elimination of the deficit based funding application is a positive move to advance inclusive education in the

province. When asked if they believe the change to formula based funding will improve inclusive education, only three of the six participants believed it would. The other three stated their divisions have already been working hard on improving inclusive education. They believe inclusive education will continue to get better, but formula funding while a piece, will not be the sole reason for the improvements.

So, what is really going to change in terms of inclusive education? I believe the biggest potential change that has been shown in this research is all students, including those students who live with special needs, will have more professional staff working with them than they did before. As has been mentioned, the student services administrators all talked about hiring fewer educational assistants and hiring more clinicians and teachers (resource and classroom). Clinicians and resource teachers will be expected to co-teach with classroom teachers thus building capacity in classroom teachers to work with more diverse students. Classroom teachers will get better at teaching to the edges instead of the middle.

Interestingly, four of the six participants, while hopeful about the potential of formula funding, expressed a fear that, if not implemented properly, some schools or divisions may see a return of some segregated practices. This finding is an important one that we all must attend to. One participant talked about the fear that segregation is cheaper than inclusion. "I am worried about that because it is cheaper to bus everybody to one place," the participant said. In our current political climate, this is a realistic fear so it will be important that educators and parents pay attention and take a stand for improving inclusive education for all students.

One participant talked about a return to clustering students who live with special needs in classrooms if there are fewer educational assistants provided to schools. The participant said:

I know the intent is that we will become more inclusive, but my fear is we will make

more cohorts… 'If I am not getting an EA for every kid I will take my two EAs and put

them in a classroom with a group of kids'…That is my fear. That is where the leadership

has to be very clear that we do not go back to setting up special ed classes or learning

assistance centers.

Another participant expressed fear that classroom teachers may return to ability

groupings in the classroom as they learn to maneuver through the new funding formula. " …but

this makes me a little nervous about ability groupings and so when we have had our

conversations we have said we will be watching for this and this cannot happen," the participant

said.

One participant expressed concern on a larger scale. If divisions are all setting criteria

very differently, that may create some pockets of segregation across the province. The

participant asked, "Do you start to get hot spots where people move to because there are more

supports? And then is that an inclusive province?"

While I was taken aback at first when some of the participants started talking about being

fearful that some segregated practices could return, it is clear that under their leadership they will

not allow this to happen. The fact they are apprehensive and cautious means they will not allow

segregated practices to return to their schools. This is an important consideration as the sample of

student services administrators I interviewed may have a more inclusive mind set than others in

different divisions. Manitoba Education must put some systems of accountability in place so that

divisions understand inclusion is the desired outcome of this funding change.

Louis Riel School Division: Formula funding initiative.

As stated in Chapter One of this thesis, in January of 2016 the Minister of Education in Manitoba announced the department would adopt the recommendations made by The Task Force on Special Needs Funding (Manitoba Education and Training, 2015) and move from the categorical based funding model to a formula based funding model (Manitoba Education and Training, 2016b). At the same time the Minister announced Louis Riel School Division (LRSD) would lead the change by participating in a two-year initiative. The idea at the time was that LRSD would implement formula funding for two years (2016-2017 and 2017-2018) and share their journey and findings with the rest of the divisions in the province. Other school divisions, he announced, would be able to opt in during the 2017-2018 school year. By the 2018-2019 school year all divisions would be funded under the formula funding model. At the time of this announcement, the province was intending to work on a formula.

Before this plan could be fully implemented there was a change in government. The new government decided all school divisions would receive funding for students living with special needs under the new formula based funding model starting in the 2017-2018 school year (Manitoba Education and Training, 2017b). This sudden change in plans meant divisions were not given the anticipated time to prepare or to learn from the LRSD initiative that was just starting its second year. Three of the student services administrators mentioned in their interviews they believe their divisions would have benefited from more time to plan and prepare for the change. In addition to a hastened timeline of implementation, the new government has not created a formula and has provided divisions with the same amount of money in 2017-2018 that they received in 2016-2017 to assist in the education of students living with special needs. This means as salaries and costs go up, the money divisions actually have to educate all students in

their divisions was effectively reduced. Regardless of the hastened timeline and reduced funding, leaders from school divisions wanting to use the change in funding as a catalyst to improve inclusive practices in their schools should look to the work LRSD has done in this area.

Louis Riel School Division has invested a lot of time and effort in the implementation of formula based funding. As part of my research I attended a public conference hosted by the Student Services Administrators Association of Manitoba in which Marlene Murray, the assistant superintendent of student services with LRSD, shared their divisional journey with other student services administrators (Murray, 2016). The student services administrators who participated in my study were interviewed in the spring of 2017. They had just learned in January of 2017 that all divisions would receive funding for students who live with special needs through formula based funding and they would receive the same amount of money in 2017-2018 that they received in 2016-2017. That spring each participant was preparing for the change in funding for the coming September. The themes that became evident in my study were similar to the experiences that LRSD went through as they embarked on the new formula funding model.

The commitment to inclusive education in LRSD starts at the top with senior administration and the board (Murray, 2016). Their work in inclusive education has been much broader than just funding. The school division made a commitment to improve inclusive education in its schools and formula based funding is just a part of the work they set out to do. They worked to create a culture of inclusion that is supported in the intentional work they did as they prepared for formula based funding. Murray (2016) described the guiding principles that helped the senior administration team begin their journey. The guiding principles are: define the goals; collaboration; trust; relationships; communication; leadership; and problem solving and decision making.

As part of the preparation, the superintendent team met with various stakeholders including: parents and students; teachers and their professional associations; educational assistants and their union; principals; and curricular and student services coordinators (Murray, 2016). They listened to any concerns and shared their vision with them.

Murray explained principals in LRSD are expected to lead the change. They are also being heavily supported by senior administration to lead that change. The division is promoting a culture of collaboration and providing leaders and school teams with time every six weeks to meet to collaborate and create their own school profile templates. Curriculum and student services coordinators are working together with these school teams to assist in creating inclusive learning environments for their students (Murray, 2016).

Formula based funding itself will not change or improve inclusive education. Divisions need to be intentional in their work to create inclusive cultures in their schools. There will be a lot of work to do as LRSD has demonstrated, but in the end the work will be impactful and inclusive for all diverse learners.

Conclusion and Recommendations

This is an exciting time for inclusive education in Manitoba. The decision by the Department of Education to accept the recommendations made by The Task Force on Special Needs Funding (Manitoba Education and Training, 2015) has sparked many conversations about inclusive practices that go much deeper than funding. The results of this study are limited as only a small sample of student services administrators were interviewed. All six participants believe a move to formula based funding is a positive move in the area of inclusive education. This study demonstrates that at least a few school divisions have started or will start to make changes in the area of inclusive education. Division leaders have started conversations with the different

stakeholders who will be affected by the change to formula based funding. There was some fear expressed by the student services administrators that if not done well, the change to formula based funding could result in a return of some segregated practices. It will be important that at all levels, from the superintendents to the principals to the classroom teachers, there is awareness and conversation about what can and cannot happen as formula based funding is implemented across the province. The Public Schools Act (2005) is very clear in providing divisions with minimal requirements of appropriate education. Manitoba Education takes this further in its belief that inclusive education is best practice and the desired outcome for all Manitoba schools.

Moving forward it is evident from this research that formula based funding has the potential to help improve inclusive education in Manitoba schools. These findings are similar to the findings from the work that has been done in both Seven Oaks School Division (SOSD) from 2010-2013 and in the Louis Riel School Division (LRSD) since September 2016. When SOSD made the move from categorical based funding to formula funding they also implemented a comprehensive plan to improve inclusive education across the division. Formula based funding on its own will not improve or change inclusive practices and SOSD recognized this as they implemented formula based funding at the same time they set out to improve school based inclusive practice (Proactive Information Services Inc., 2013b). Some of these improvements included: the implementation of a circle of support that starts with the student, his/her parents, and the classroom teacher; a focus on the co-teaching model in which two professionals work together to meet the needs of a diverse class of students; and the belief that diversity is the norm in all classrooms and teaching and supports need to be reflective of this. Six themes came out of the data as reported by Proactive Information Services Inc. (2013b). The themes were: each school is diverse with unique needs and must be allowed to meet the needs of its population in

ways that make sense for them; schools need to be allowed time to experiment and try different

approaches; the concept of Universal Design was helping to meet the needs of all, however there

was still concern about meeting everyone's needs; a team approach is essential in successful

inclusive schools; team members, particularly co-teachers need to be compatible in their beliefs

and understandings of inclusion and; planning time had to be made available for team members.

       The initial findings from LRSD seem to echo some of the findings from the SOSD pilot.

It is possible that LRSD followed the work that was done by SOSD and borrowed from it as they

began to talk about moving from categorical based funding to formula based funding. The work

that has been done thus far by LRSD has been intentional and carefully planned. Prior to the

change in funding, senior administration provided clear direction about the division's belief in

inclusive practices (Murray, 2016). This message of inclusion and the philosophy behind the

change to a formula based funding model was shared with key stakeholders: parents and

students; teachers and their professional associations; EAs and their union; principals; and

curricular and student services consultants and coordinators (Murray, 2016).

       The literature around best inclusive practices continually emphasizes the importance of

building capacity and creating collaborative cultures among staff to improve inclusive practices

in schools (Fullan & Quinn, 2016). Most of the student services administrators interviewed in

this study also talked about the changing role of staff and how vital it will be to help staff learn

these new expectations so inclusive education can continue to develop in schools. Building

capacity of staff has been a main focus for LRSD (Murray, 2016). School teams consist of a

principal, student services teachers and two classroom teachers and these school teams

collaborate by creating a profile of needs from student, classroom, and school profiles (Murray,

2016). This idea is also supported in the literature. "If we want to shift the organization, we need

to pay attention to both the quality of the capacity building and the degree of collaborative learning" (Fullan & Quinn, 2016, p. 60). As formula funding is implemented across the province, divisions hoping to improve inclusive practices in their schools must be intentional in their work in building capacity and creating collaborative cultures.

School leaders who want to use the change in funding to improve inclusive education in their schools should consider making inclusion a priority by including it in their school goals and planning. Katz (2012) created the Three Block Model of Universal Design for Learning. Block one focuses on Social and Emotional Learning; Block Two focuses on inclusive instruction; and Block Three focuses on the systems and structures required for inclusive practices to succeed. While all three blocks are important, school leaders should spend some time implementing Block Three to improve inclusive education in their schools. The main components of Block Three are: creating an inclusive policy with no exceptions; hiring administrators who have a vision and expertise in the area of inclusive education; distributed leadership; professional development in the form of professional learning communities (PLCs); intentional staffing to support collaborative practice; and budgeting (Katz).

To create an inclusive policy, leaders should start by creating an inclusive service delivery model (Manitoba Education and Advanced Learning, 2014). Brownlie and King (2000) refer to a more inclusive service delivery model as a "noncategorical model" (p. 78). They describe this model as one in which specialist teachers such as ESL teachers, reading teachers or resource teachers work with all students in a classroom and not only students who were referred to them. This model reduces the number of assessments needed and encourages resource teachers to co-teach, co-plan and co-assess alongside a classroom teacher in an effort to meet the needs of all learners (Brownlie & King, 2000). This idea was supported by The Task Force and was one

of the reasons they recommended the elimination of categorical based funding (Manitoba Education, 2015).

School leaders, including principals, have the opportunity to create the conditions for inclusive education to thrive. From my own practice I have seen the benefit of intentional collaboration time with school teams and between teachers and resource teachers. Principals need to support, for example through their staffing, budgeting and scheduling processes (Katz, 2012). There is no one-size-fits-all approach. Every school has dynamics and culture that make it unique. However, principals can ensure that resources such as PLCs, professional books, and speakers, and tools such as an inclusive service delivery model, class and school profiles, and collaborative time tables are prioritized and made available to staff to improve inclusion in their schools.

As teachers start to change their practice in classrooms to be more inclusive, expectations of student learning must be set high. Katz's (2012) Three Block Model of Universal Design for Learning emphasizes that learning for all students should focus on higher order thinking. She weaves together subjects, including numeracy and literacy, to create inquiry lessons to help students make meaningful connections to what they are learning (Katz, 2012). The idea is that all students will benefit from teaching and learning in which they need to demonstrate a higher level of understanding. Inclusive education, if it is to be successful, must hold all learners to a higher standard. Schools are accountable to parents, school boards, and provincial departments of education. Schools are in the business of teaching and learning and they must ensure that students are literate and numerate so they can lead their best lives possible. Inclusive schools ensure that this is done for all.

Further research is needed as to how to best utilize educational assistants in inclusive schools. Manitoba has relied on educational assistants to deliver educational programming to students living with special needs for far too long. All six of the student services administrators talked about the benefits in the changing role of the educational assistant. They also talked about employing fewer educational assistants in order to employ more professional staff including clinicians and teachers. This change needs to be done in a respectful manner, one which does not demoralize the educational assistants who are working and will continue to work in Manitoba schools.

Another area that needs to be explored further is the role of Manitoba Education. There must be systems for accountability put in place to ensure schools are meeting at minimum, the regulations and standards from the *Appropriate Educational Programming Regulation* (The Public Schools Act, 2005). Inclusive education has evolved since 2005 and Manitoba Education might want to ensure its own regulations are more in line with research based practices in the area of inclusion. "For too long efforts to advance inclusive education have attempted to retrofit existing service delivery models that were not initially intended to accommodate the range of student diversity currently present in public schools" (Giangreco, 2010, p. 344). Manitoba Education has and continues to publish many documents to help support inclusion in Manitoba schools. Manitoba Education should take this further and create policy that is based on current research of best practice in inclusive education.

As divisions in Manitoba embark on the change from categorical based funding to formula based funding they should consider using this change as a starting point to improve inclusive education in their schools. As has been mentioned several times throughout this paper, a change to formula based funding will not make schools more inclusive. Rather the change to

formula based funding has started the conversations necessary to make improvements in the way

all diverse students are educated in Manitoba schools.

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Appendix A

UNIVERSITY OF MANITOBA | Research Ethics and Compliance

Human Ethics
208-194 Dafoe Road
Winnipeg, MB
Canada R3T 2N2
Phone +204-474-7122
Email: humanethics@umanitoba.ca

PROTOCOL APPROVAL

TO: **Karen Fraser**   **(Advisor: John Van Walleghem)**
Principal Investigator

FROM: **Sarah Teetzel, Vice Chair**
Education/Nursing Research Ethics Board (ENREB)

Re: **Protocol #E2017:027 (HS20616)**
"Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba?"

Effective: April 4, 2017   **Expiry:** April 4, 2018

Education/Nursing Research Ethics Board (ENREB) has reviewed and approved the above research. ENREB is constituted and operates in accordance with the current *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans.*

This approval is subject to the following conditions:

1. Approval is granted only for the research and purposes described in the application.
2. Any modification to the research must be submitted to ENREB for approval before implementation.
3. Any deviations to the research or adverse events must be submitted to ENREB as soon as possible.
4. This approval is valid for one year only and a Renewal Request must be submitted and approved by the above expiry date.
5. A Study Closure form must be submitted to ENREB when the research is complete or terminated.
6. The University of Manitoba may request to review research documentation from this project to demonstrate compliance with this approved protocol and the University of Manitoba *Ethics of Research Involving Humans.*

Funded Protocols:
- **Please mail/e-mail a copy of this Approval, identifying the related UM Project Number, to the Research Grants Officer in ORS.**

Human Ethics
208-194 Dafoe Road
Winnipeg, MB
Canada R3T 2N2
Phone +204-474-7122
Email: humanethics@umanitoba.ca

UNIVERSITY of **MANITOBA** | Research Ethics and Compliance

RENEWAL APPROVAL

Date:	March 20, 2018	**New Expiry:**	April 4, 2019

TO: **Karen Fraser**   (Advisor John Van Walleghem)
Principal Investigator

FROM: **Zana Lutfiyya, Chair**
Education/Nursing Research Ethics Board (ENREB)

Re: **Protocol #E2017:027 (HS20616)**
"Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba?"

Education/Nursing Research Ethics Board (ENREB) has reviewed and renewed the above research. ENREB is constituted and operates in accordance with the current *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans.*

This approval is subject to the following conditions:

1. Any modification to the research must be submitted to ENREB for approval before implementation.

2. Any deviations to the research or adverse events must be submitted to ENREB as soon as possible.

3. This renewal is valid for one year only and a Renewal Request must be submitted and approved by the above expiry date.

4. A Study Closure form must be submitted to ENREB when the research is complete or terminated.

Funded Protocols:
- **Please mail/e-mail a copy of this Renewal Approval, identifying the related UM Project Number, to the Research Grants Officer in ORS.**

Appendix B

UNIVERSITY OF MANITOBA

April 5, 2017

Dear Superintendent,

My name is Karen Fraser and I am a graduate student in the Faculty of Education at The University of Manitoba. I am carrying out a study for my M.Ed. thesis titled, Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba? In this study I will examine the perspectives of student services administrators on the topic of the change to a formula model for special needs funding. My research questions are;

1. What are the anticipated changes that will be the result of the new formula funding model?

a. How do school division leaders, specifically student service administrators prepare for and support these changes?

b. How will different roles such as the role of the principal, the resource teacher, and the classroom teacher be affected by the change?

c. How are these changes anticipated to impact inclusive education at the school level?

My thesis advisor is Dr. John VanWalleghem. He can be contacted by phone at ▮▮▮▮▮▮▮▮ or by email at ▮▮▮▮▮▮▮▮▮▮

This study has been approved by the Education and Nursing Research Ethics Board (ENREB) at the University of Manitoba. If there are any concerns or complaints about this project, contact the Human Ethics Coordinator at 204-474-7122 or humanethics@umanitoba.ca.

I am recruiting student services administrators who are willing to share their thoughts and ideas in regards to the change to special needs funding in the province of Manitoba. The interview will be approximately one hour in length and at a place and time that is convenient for them.

Every effort will be made to maintain confidentiality. Student service administrators and school divisions will not be identified and will be referred to using a pseudonym. Participants may withdraw from the study at any time, in which case their comments will not be used. I will be the only person to have access to participants' names, although my thesis advisor will have access to the anonymized data. Audio digital recordings and all electronic data will be stored on a password protected device or computer. All hard copies of the data will be locked in a filing cabinet in my home office. I will store the anonymized and identifiable data in separate drawers. All data will be destroyed in five years from completion of this study, anticipated to be August 2022.

Once the thesis is complete you may access the final results by providing me with your contact information so that I can send you the final summary.

The findings of this study will be shared with my thesis advisor and thesis committee. The findings of this study will be presented at a public thesis defense meeting and may be disseminated in presentations or publications. The final copy of this thesis will be available to the public through the University of Manitoba Library.

I have attached in this package of materials:

- The invitation letter to student services administrators to participate in this research study

- The consent form for individuals who wish to be interviewed.

The support I am requesting from the division consists of:

- Superintendent permission to engage in the research

- Superintendent distribution of the invitation letter and consent form to potential participants

Your signature on the Superintendents' Consent Form will authorize your approval for this research project and agreement to provide the listed supports above. Thank you for your time and consideration. My email address is █████████████████

Sincerely,

Karen Fraser

Appendix C

Thesis title: *Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba?*

Dear Ms. Fraser,

I am willing to arrange for the distribution of the recruitment materials for your study, titled, *Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba?* I understand that you will be conducting at least six interviews with student services administrators from across the province of Manitoba. My signature on this form indicates that I will forward the invitation letter and the consent form to student service administrators in the division. I understand that my signature on this form indicates that I have understood to my satisfaction the information regarding participation and supports listed in the request. In no way does this letter waive my legal rights nor release the researchers, sponsors or involved institutions from their legal and professional responsibilities. I am free to withdraw my consent from the study at any time, and I am free to ask for clarification or new information throughout the study.

The University of Manitoba may look at the research records for this study to ensure that I have carried it out in a safe and proper way. This consent form, a copy of which will be left with you for your records and reference, is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information

not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

_____   _____

Superintendents' Signature   Date

School Division Name: _____

I would like to receive a summary of the results of this study. To that end, my contact information for receipt of study findings is included below.

Contact Information:

_____

Appendix D

April 5, 2017

Dear Student Services Administrator,

My name is Karen Fraser and I am a graduate student in the Faculty of Education at The

University of Manitoba. I am carrying out a study for my M.Ed. thesis titled, *Will a Change to*

Special Needs Funding Improve Inclusive Education in Manitoba? In this study I will examine

the perspectives of student services administrators on the topic of the change to a formula model

for special needs funding. My research questions are;

1. What are the anticipated changes that will be the result of the new formula funding

    model?

    a. How do school division leaders, specifically student service administrators prepare

        for and support these changes?

    b. How will different roles such as the role of the principal, the resource teacher, and the

        classroom teacher be affected by the change?

    c. How are these changes anticipated to impact inclusive education at the school level?

My thesis advisor is Dr. John VanWalleghem. He can be contacted by phone at ▮▮▮▮▮▮▮▮ or

by email at ▮▮▮▮▮▮▮▮▮▮▮

.

The study has been approved by the Education and Nursing Research Ethics Board (ENREB) at

the University of Manitoba. If there are any concerns or complaints about this project, contact

the Human Ethics Coordinator at 204-474-7122 or humanethics@umanitoba.ca.

I am recruiting student services administrators who are willing to share their thoughts and ideas

in regards to the change to special needs funding in the province. This interview will take

approximately an hour of your time and at a place and time that is convenient for you.

Every effort will be made to maintain confidentiality. You will not be identified and you will be

referred to with a pseudonym. You may withdraw from the study at any time, in which case your

comments will not be used. I will be the only person to have access to participants' names,

although my thesis advisor will have access to the anonymized data. Audio digital recordings

and all electronic data will be stored on a password protected device or computer. All hard

copies of the data will be locked in a filing cabinet in my home office. I will store the

anonymized and identifiable data in separate drawers. All data will be destroyed in five years

from completion of this study, anticipated to be August 2022.

Once the thesis is complete you may access the final results by providing me with your contact

information so that I can send you the final summary.

The findings of this study will be shared with my thesis advisor and thesis committee. The

findings of this study will be presented at a public thesis defense meeting and may be

disseminated in presentations or publications. The final copy of this thesis will be available to the

public through the University of Manitoba Library.

Attached is the consent form to this letter which details the parameters of this study, your right to

withdraw at any time, and issues around anonymity and the confidentiality of your participation.

Once again, your participation is voluntary. Should you wish to participate, please contact me,

Karen Fraser at ███████████████. You will be asked to sign the consent form that is

attached to this letter prior to the interview. The first three city of Winnipeg and the first three

rural student services administrators will be interviewed for the purpose of this study. After each

interview I will email a copy of the typed interview transcript to participants and invite them to

review the transcript. I will use the email address the participants provide on the consent form.

Reviewing the transcripts should take twenty to thirty minutes. Participants will have two weeks

to respond with any changes to my email address. After two weeks, I will proceed to analysis.

Sincerely,

Karen Fraser

Appendix E

Interview Consent Form

Researcher: Karen Fraser
Graduate Student, Department of Educational Administration, Foundations and Psychology
University of Manitoba
Email: ▮▮▮▮▮▮▮▮▮▮▮▮▮
Thesis Advisor: Dr. John VanWalleghem, ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮

April 5, 2017

Dear Participant,

My name is Karen Fraser and I am a graduate student at the University of Manitoba. My thesis advisor is Dr. John VanWalleghem. The study has been approved by the Education and Nursing Research Ethics Board (ENREB) at the University of Manitoba. If there are any concerns or complaints about this project, contact the Human Ethics Coordinator at 204-474-7122 or humanethics@umanitoba.ca.

The findings of this study will be shared with my thesis advisor and thesis committee. The findings of this study will be presented at a public thesis defense meeting and may be disseminated in presentations or publications. The final copy of this thesis will be available to the public through the University of Manitoba Library.

The title of this study is: *Will a Change to Special Needs Funding Improve Inclusive Education in Manitoba?*

The University of Manitoba may look at the research records for this study to ensure that I have carried it out in a safe and proper way. This consent form, a copy of which will be left

with you for your records and reference, is only part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

I am recruiting student services administrators who are willing to share their thoughts and ideas in regards to the change to special needs funding in the province. This interview will take approximately one hour of your time at a place and time that is convenient for you.

Every effort will be made to maintain confidentiality. You will not be identified and you will be referred to with a pseudonym. You may withdraw from the study at any time, in which case your comments will not be used. I will be the only person to have access to participants' names, although my thesis advisor will have access to the anonymized data. Audio digital recordings and all electronic data will be stored on a password protected device or computer. All hard copies of the data will be locked in a filing cabinet in my home office. I will store the anonymized and identifiable data in separate drawers. All data will be destroyed in five years from completion of this study, anticipated to be August 2022.

The interview transcript will be typed by me and returned to you via the email contact you provide on this consent form in order for you to add, change, or delete any information. The review of the transcript should take between twenty to thirty minutes of your time. You will have two weeks to review the information and provide feedback to me via the email address provided on this form. If I do not hear from you within two weeks, I will assume you are comfortable with the information and proceed to analysis.

Once the thesis is complete you may access the final results by providing me with your contact information so that the final summary can be forwarded to you.

The findings of this study will be shared with my thesis advisor and thesis committee. The findings of this study will be presented at a public thesis defense meeting and may be disseminated in presentations or publications. The final copy of this thesis will be available to the public through the University of Manitoba Library.

There is no more risk in this study than one would normally assume in one's regular life. Participants may benefit from the insight and knowledge they obtain from their participation in and the results of this study.

Your signature on the bottom of this form indicates that you have understood to your satisfaction the information regarding participation in this research study and agree to participate as a subject. In no way does this waive your legal rights, nor release the researcher or involved institutions from their legal and professional responsibilities. You are free to withdraw from the study at any time, and/or refrain from answering questions you prefer to omit, without prejudice or consequence. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation. Sincerely,

Karen Fraser

PLEASE SEE SIGNATURE PAGE ON NEXT PAGE

I have read the consent form and consent to participate in the interview and research being

conducted by Karen Fraser, University of Manitoba.

_____   _____
Participant   Date

_____   _____
Researcher   Date

The address to which a final report of this study can be sent is listed below.

_____
_____
Participant's address (physical or electronic)

Appendix F

Interview Questions

1. Please provide me with an overview of your job role and particularly how it connects to provincial funding of students who have special needs.

2. How have you in your role as a student services administrator begun to prepare for the implementation of formula funding over the next school year? Please describe the steps you think will occur in your school division.

3. Are you using the funding changes to encourage specific programming changes within your school division? If so, what are those programming changes and how are you encouraging them?

4. Are there changes that you think will occur naturally (i.e., without the influence of divisional leaders)? If so, what are they and how will you help staff prepare for these changes?

5. How will your division how will you make decisions as to how to organize your supports for students living with special needs?

6. Do you think that services and/or supports look different than in previous years? Please explain.

7. Do you think that this shift in funding make a difference in terms of inclusive education for the students in your division? Why or why not?

8. As your school division begins to plan for the implementation of the new funding model, what are your apprehensions?

9. As your school division begins to plan for the implementation of the new funding model what are you hoping for?

10. What changes, if any, do you foresee from the recently changed timeline for implementation; where all school divisions must comply by this coming fall?

11. Is there anything else that you would like to add?