Elementary School Principals as Leaders of Inclusion for Students With Exceptionalities

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Submitted in partial fulfillment

of the requirements for the degree of

Master of Education

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Abstract

Inclusion promotes equality, provides opportunities, breaks down barriers, and ensures accessibility for all members of a community. Consequently, elementary-school administrators should become inclusion leaders who introduce and maintain inclusive learning environments. This qualitative study profiled and discussed practices and beliefs of 4 elementary school principals in southern Ontario who are recognized leaders of inclusion for students with exceptionalities. The researcher used multiple instruments for triangulation, thematic qualitative data analysis (constant comparative method) of interview responses and reflective field notes, and data from the *Principal and Inclusion Survey* to interpret qualitative findings. Findings revealed distinct leadership profiles reflective of empathy and compassion among participants who all regard accommodation of students with exceptionalities as a moral obligation and view inclusion as a socially just pedagogical framework. The researcher recommends that senior school board administrators screen and secure principals who value inclusion to create and maintain school cultures that ensure students' access to inclusive education.

decision-making. Thank you both for your support, motivation, and your tremendous

dedication as my thesis committee members.

Finally, words cannot express my sincere gratitude to Dr. Tiffany Gallagher, my

professor, research-assistantship supervisor, international research project leader,

teaching practicum counsellor, and most significantly my Master of Education thesis

advisor. Thank you for your endless support and for helping me to realize my potential.

You have elevated my awareness of social justice for persons with disabilities and you

acted as a model of a true teacher who consistently acts as a champion for students. I am

so fortunate to have been able to work with you these past few years.

Dedication

I dedicate this thesis to my parents who have been my advocates and champions throughout this endeavour. You instilled in me, as my first teachers, the essential values of compassion, empathy, and the importance of embracing and respecting difference in our world. I am truly grateful for your support and encouragement.

Thanks Mom and Dad!

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CHAPTER ONE: INTRODUCTION TO THE STUDY

Inclusion promotes equality, provides opportunities, breaks down barriers, and ensures accessibility for all (Frattura & Capper, 2007; Theoharis, 2009) — be it in the classroom, workplace, or greater community. Therefore, society should introduce children to inclusivity in their earliest and principal learning environment: elementary school.

Elementary school administrators can foster inclusion[1] by creating and maintaining inclusive learning environments (Praisner, 2003; Riehl, 2000). Principals who advocate inclusion are leaders who: support and steer staff in the delivery of inclusionary practices (both inside and outside of the classroom), make inclusion of students with exceptionalities a decision-making priority, and model to the school community a personal philosophy of inclusion. This study profiles and examines practices of elementary school principals who are recognized leaders of inclusion.

This introductory chapter presents the background to and statement of the problem along with the purpose statement and research questions that guide the qualitative study. The chapter then presents the study's rationale, theoretical framework, classification of terms, and scope and limitations. It concludes with an outline of the remainder of the document.

Background to the Problem

Inclusive education is a fundamental practice in which students attend neighbourhood schools in age-appropriate, regular (mainstream) classes where they are supported to learn, contribute, and participate in all aspects of school life (Porter, 2008).

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[1] The study uses the word "inclusion" within the context of special education.

Inclusion of persons with disabilities is deeply rooted in international, national, and provincial legislation including the United Nations' *Convention on the Rights of Persons with Disabilities* (United Nations, 2006), the *Canadian Charter of Rights and Freedoms* (Department of Justice Canada, 1982), and Ontario's *Education Act* (Statutes of Ontario, 1990). The Ontario Ministry of Education's (2006) *Education for All* and *Special Education Transformation* (Bennett & Wynne, 2006) outline ministry policies on the inclusion of students (K to 12) in public education. Application of these policies is not always harmonious as disparate individuals and institutions create policy at international, national, provincial, and school-board levels and within the elementary school itself— something Malen (2005) characterizes as a "web of policies" (p. 199).

Canada was one of 80 signatory nations that in 2006 prohibited discrimination on the basis of disability by signing the United Nation's *Convention on the Rights of Persons with Disabilities*. Notably, Article 24 states that persons with disabilities have a right to education. This mandate foregrounds the rights of persons with disabilities at the international level by advocating for individuals' right to full inclusion and equal opportunity to participate freely in society.

Canada's obligation at the international level is aligned with its own *Charter of Rights and Freedoms*. The *Charter* outlines basic rights and freedoms guaranteed for all Canadians:

> Every individual is equal before and under the law and has the right to equal
> protection and equal benefit of the law without discrimination and, in particular,
> without discrimination based on race, national or ethnic origin, colour, religion,
> sex, age or mental or physical disability. (Department of Justice Canada, 1982,

Section 15.1)

Because public education policy in Canada is a provincial responsibility (with the exception of First Nations education) that varies from one jurisdiction to another, the *Charter* is the sole federal legislation that influences provincial education policies (Zinga, Bennett, Good, & Kumpf, 2005).

In Ontario, the Ministry of Education is the principal authority on policymaking with respect to K-12 public education. Special education in Ontario stems from the *Education Amendment Act* (also known as Bill 82) which in 1980 amended the 1974 *Education Act*. Bill 82 was "based on the principle of 'universal access' to public education, which guarantees the right of all children to be enrolled in a publicly funded school" (Bennett & Wynne, 2006, p. 1). Although implemented over a 4-year period, Bill 82 became a "normal, functioning part of Ontario's education system with remarkable speed" (Weber & Bennett, 2004, p. 11). Weber and Bennett (2004) add that

> Teachers still active today can point to a time only a decade before 1980, when the idea of sending students with special needs to a regular school was not even considered by most jurisdictions in the province. Yet within a decade after 1980, special education was as integral to the system as notebooks and chalk. (p. 11)

Bill 82 was landmark legislation in Ontario and proponents for and against inclusion advocated their case after its enactment; the former, for example, argued that exclusive placements outside regular classrooms infringed on equality rights of students with exceptionalities under the *Charter of Rights and Freedoms*. Currently, the Ontario *Education Act*'s Regulation 181/98 (Ontario Ministry of Education, 1998) on special education favours an inclusive placement in regular classrooms for students with

exceptionalities, though school boards may recommend one of the many options within a full range of alternative placements during an Identification, Placement, and Review Committee decision (IPRC) (Ontario Ministry of Education, 2001). Thus, the majority of students with exceptionalities are educated with their peers in regular classrooms in their neighborhood schools "but because inclusion remains an adaptable concept, a minority continues to be accommodated in other ways" (Weber & Bennett, 2004; p. 15).

Ontario school boards' inclusive practices vary despite overarching Ministry special education directives that encompass inclusion of students with exceptionalities in regular classrooms (Weber & Bennett, 2004); some boards support complete inclusion while others with long-established delivery systems prefer a range of placement options (Bennett & Wynne, 2006). The debate on inclusion continues due to proponents' deep-seated ideological beliefs regarding best practices for educating students with exceptionalities (Kaffman & Hallahan, 2005; Lindsay, 2003; McDougall, DeWitt, Kinga, Miller, & Killip, 2004; McPhail & Freeman, 2005).

In recent years, the Ministry clearly has documented its support for differentiated instruction and universal design in Ontario schools to ensure teachers instruct all students in their care, and has highlighted administrators' key role in maintaining such inclusive learning environments (Bennett & Wynne, 2006; Ontario Ministry of Education, 2005, 2009, 2010, 2011). The Ontario College of Teachers (OCT)—the province's regulatory body for the teaching profession—has also championed inclusive education, as evidenced in its development of a new three-part Additional Qualifications course titled "Inclusive Classroom." In addition, the OCT requires an inclusive-practices component in pre-service curriculum and also addresses inclusion in the revised Principal's Qualification

Program and Supervisory Officer's Qualification Program (OCT, 2009). This study

therefore is aligned with the Ministry's and the OCT's recent mandates and current

commitment to inclusive education as it documents exemplary inclusive practices

currently displayed by administrators in Ontario elementary schools.

      Under the *Education Act* (Ontario Ministry of Education, 1998), principals have a

legislated responsibility to manage the education of elementary-school students with

exceptionalities, and also oversee the development and implementation of such students'

Individual Education Plans (IEPs). The identification of a student's exceptionality is a

collaborative process undertaken by a school-based team of educators and administrators;

elementary school principals are key members of the team, which is often chaired by the

special education resource teacher (SERT). The principal also chairs Identification

Placement Review Committees (IPRCs) that determine placements during annual reviews

of special education programs or upon students' identification as exceptional. Although

such committees share responsibility in the decision-making process, the administrator's

viewpoints carry a great deal of weight in placement decisions.

      Praisner (2003), for example, found that principals with positive attitudes towards

inclusion promoted feelings of belonging in school environments and "were more likely to

believe that less restrictive placements were most appropriate for students with disabilities"

(p. 141). Because school culture and environment affect inclusivity (McDougall et al.,

2004; Riehl, 2000), principals who promote "forms of teaching and learning that enable

diverse students to succeed and mold school cultures that embrace and support diversity"

(Riehl, 2000, p. 187) foster best practices that ultimately address the needs of diverse

students. Consequently, this study documents such principals' practices in order to provide

other administrators with strategies or best practices that may be applied to their school communities.

Principals who enable diversity are instructional leaders and influential members of schools' professional learning communities (PLCs). PLCs are defined as a "group of people who take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems, and perplexities of teaching and learning" (Mitchell & Sackney, 2000; p. 9). DuFour (2004) describes PLCs as a "powerful collaboration" and a "systematic process in which teachers work together to analyze and improve their classroom practice" (p. 9). Elementary school principals may encourage PLCs that focus on inclusion in order to create or maintain inclusive environments. Although PLC membership is ostensibly equal, principals play a prominent role: "Principals typically function as gatekeepers for change and innovation, and the eventual outcome of a staff development initiative often rests upon the guidance and support furnished by the principal" (Dufour, 1991, p. 9). Such power structures in elementary schools' PLCs create a need for principals with positive attitudes towards inclusion to ensure it becomes or remains a priority in school-improvement efforts.

Statement of the Problem

The literature suggests that principals who are effective inclusionary leaders influence their schools' PLCs, delegate program decision-making and responsibilities, and essentially help create and maintain inclusive learning environment for all students (Frederickson, Simmonds, Evans, & Soulsby, 2007; McDougall et al., 2004; Riehl, 2000). In short, principals who are leaders of inclusion build relationships between and within the school and community (Riehl, 2000).

Unfortunately, not all elementary school principals are committed to inclusivity (Praisner, 2003). Given their leadership roles, principals can be positive or negative agents with substantial (positive or negative) influence. As Praisner (2003) summarizes, "Due to their leadership position, principals' attitudes about inclusion could result in either increased opportunities for students to be served in general education or in limited efforts to reduce the segregated nature of special education services" (p. 136).

Purpose of the Study

This study sought to shed light on the experiences of elementary school principals who are leaders of inclusion within their schools' PLCs. The qualitative study allowed the researcher to identify specific characteristics of principals who help create and maintain inclusive learning environments for students with exceptionalities. Since administrators set the tone and direction of their respective schools, they must encourage and support members of the PLC to adopt inclusive programming and develop a team approach among school staff to meet the inclusion needs of students with exceptionalities. Thus, it is timely to identify and document the practices of exemplary elementary school principals who are leaders of inclusion in order to provide a model which other administrators may find beneficial for their own professional practice.

Such leaders include the four elementary school principals from three southern Ontario school boards who participated in the study; all were recognized for excelling in their roles as leaders of inclusion within their schools' PLCs. The participants were recommended by their school boards' senior staff (who are responsible for special education) based on the participants' excellence as leaders of inclusion within their respective PLCs. The purpose of the study was threefold: (a) to examine the experiences

and identify characteristics of elementary school administrators who attempt to establish and maintain inclusive learning environments; (b) to reveal what principals encounter in their role as inclusion leaders in their schools' PLCs; and (c) to investigate how elementary school administrators delegate duties to help create and maintain inclusive learning environments for students with exceptionalities.

Research Questions

The following questions guided the inquiry:

1. How do elementary school administrators conceptualize and create effective inclusive learning environments in their schools?

2. What do elementary school administrators encounter as they attempt to establish and maintain inclusive learning environments in their schools?

3. How do elementary school administrators delegate duties to help establish and maintain inclusive learning environments for students with exceptionalities?

4. What do administrators experience as inclusion leaders in their schools' PLCs?

5. What are the characteristic administrative styles of elementary school administrators in their role as leaders of inclusion?

Rationale

All educational policies carry certain costs (Malen, 2005) and the implementation of special education in the province of Ontario is no exception. Kelley (2000) refers to cost as "capacity"—the "presence or absence of appropriate human capital, physical capital, materials, and financial resources needed to support educational achievement"— and notes that capacity "influences the quality of policy decisions and their effectiveness"

(p. 73). With this in mind, special education policymaking at all levels must consider the cost and assess how to best utilize finite resources.

Ontario's budget for special education is considerable: "education funding was projected to be $17.2 billion in 2005-06, with $1.9 billion of this amount dedicated to special education funding" (Bennett & Wynne, 2006, p. 7). While reassessment and policy changes may be needed to improve services for students with exceptionalities and to make such services more cost effective, choices policymakers make ultimately affect the budget for other programs: "all costs represent the sacrifice of an opportunity that has been foregone. ... By using resources in one way, we are giving up the ability to use them in another way, so a cost has been incurred" (Levin & McEwan, p. 44). Not surprisingly then, the capacity for special education services helped shape the creation of the Working Table in 2005 that ultimately produced the *Special Education Transformation* document.

The co-chairs of the Working Table, Kathleen Wynne and Dr. Sheila Bennett included the following questions that guided committee discussions: "How can the ministry most equitably and most effectively fund school boards to provide those programs and services so that the highest learning benefit accrues to the whole range of students?" "What are the characteristics of a funding system that will generate the outcomes we seek?" (Bennett & Wynne, 2006, p. 4). Cost of intervention was clearly a driving force behind Special Education Transformation.

The Working Table was established to explore funding alternatives to improve service while maintaining cost efficiency. Although the Working Table discussed and made recommendations on other lingering topics in special education, the funding formula was one of the few matters left unresolved. The co-chairs recommended that the

Ministry "improve the balance between the focus on learning and the need for appropriate processes, documentation, and accountability" and "Develop and phase in a simpler, streamlined funding process that provides protected special education funds that flow to boards in a predictable manner" (Bennett & Wynne, 2006, p.31). These changes would allow school boards to predict their special education funding in future years allowing them to "shift to service planning and improving efficiency in the use of resources, instead of reporting and verifying claims to the ministry" (Bennett & Wynne, 2006, pp. 20-21). Currently, the province uses the Special Education per pupil Amount (SEPPA); though the Working Table investigated various models to improve the funding formula for special education, it concluded that "no ideal model currently exists" (Bennett & Wynne, 2006) and recommended continued research for better strategies that would allow school boards to strategically position their human capital to best serve their student population.

Principals who subscribe to a social constructivist paradigm are principals who are able to increase opportunities for students to be served in regular classrooms (Hadjikakou & Mnasonos, 2012; Horrocks, White, & Roberts, 2008; Praisner, 2003; Riehl, 2000). Consistent with Vygotsky's theory (1978), principals who act as inclusion leaders acknowledge the benefit when learners construct knowledge through social interactions with each other. Also, principals who foster a sense of 'belonging' in their school communities appeal to Maslow's (1954) higher order needs. Thus, inclusion leaders are able to work within a systemic funding constraint reality while serving all students in social constructivist and humanistic environments. This research proposes a strategy that offering inclusive placements for students would allow school boards to

strategically position their capital to best serve the student population as all students would attend their neighbourhood schools. Consequently, identifying strategies used by inclusion leaders who are constrained by the current funding formula will help other administrators become more effective inclusionary leaders in similar circumstances.

I also acknowledge my personal rationale for this research. Based upon my experiences in the classroom since I began teaching 5 years ago, as well as those in my journey as a student in public education, inclusion is at the core of my philosophy of education. As a classroom teacher, I witness the impact and benefits of inclusion within the classroom community. It was this interest in inclusive education and educational administration that inspired my research into this topic throughout my pre-service teacher training program and my master of education graduate studies research. Ultimately, my research will extend into my future PLCs so that I may promote inclusion and ensure that all students have access to education.

Theoretical Framework

Creswell (2008) states that "A theoretical lens… is a guiding perspective or ideology that provides structure for advocating for groups or individuals writing the report" (p. 515). This investigation is filtered through the lens of social constructivism, which according to Vygotsky (1978) underscores the social contexts of learning—learners construct knowledge through social interactions with each other.

The development of school PLCs—"a group of people who take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems, and perplexities of teaching and learning" (Mitchell & Sackney, 2000, p. 9)—has received much attention in recent years. Collaborative cultures such as

PLCs are beneficial for school improvement and student success: "Teachers work in teams, engaging in an ongoing cycle of questions that promote deep team learning. This process, in turn, leads to higher levels of student achievement" (DuFour, 2004, p. 9). Principals who foster such camaraderie articulate the importance of learning together and socially constructing knowledge.

Principals who excel as leaders of inclusion model inclusivity and facilitate learning opportunities within the school community that embrace collaborative learning, for students and staff alike (Frattura & Capper, 2007). As Bandura (1986) notes, modeling is an essential element of social learning, and educators working as a collaborative unit model inclusion for all students, parents, fellow staff members, and members of the community. Social constructivism thus is the foundation of inclusive education, as students learn together in the same regular classrooms. Inclusion would also act as a potential funding strategy that would allow school boards to strategically position their human capital to best serve their student population within a funding constraint reality. Social constructivists acknowledge the social benefits of learning together in heterogeneous classrooms, including all students with exceptionalities. This instructional approach has the potential to address challenges that are posed to school boards' funding models.

In an inclusive model, the teacher creates opportunities for students to interact with their peers (Kozulin, 2000) and facilitates students' learning by differentiating instruction to ensure that students with individual learning needs develop their individual strengths (Case, 1999). Principals who excel as leaders of inclusion tend to promote socially interactive situations for students of all abilities and it is likely that they are both

conscious of and empathetic towards their students' social needs. In this vein, the research also adopts a humanist lens associated with Maslow's (1954) view that motivation and initiative are related to a "hierarchy of needs." Administrators who foster a sense of "belonging" in their schools correspond to Maslow's higher order needs that encompass a sense of belonging and ultimately self-actualization. By appealing to the higher order needs of students, educators facilitate learning environments that embrace such a sense of belonging.

In addition to fostering a sense of belonging, diverse school communities also diminish incidents of harassment and bullying (Porter, 2008). Such a humanist position embraces difference and instills in all students—those with and without exceptionalities—an understanding of empathy, tolerant attitudes, and familiarization with advocacy (Farrell, Dyson, Polat, Hutchenson, & Gallannaugh, 2007; Norwich & Kelly, 2004). Moreover, including students with exceptionalities in the regular classroom does not have a negative impact on other students' academic achievement (Kalambouka, Ferrell, Dyson, & Kaplan, 2007; Sermier Dessemontet & Bless, 2013).

Classification of Terms

This study refers to some key terms that are defined as follows:

Inclusion or *inclusive education* refers to the fundamental practice that all students attend their neighbourhood schools in age-appropriate, regular classes and are supported to learn, contribute, and participate in all aspects of the life of the school.

Exceptionality refers to categories revised by the Ministry of Education in January 1999. These categories provide Identification, Placement, and Review Committees (IPRCs; see below) with the range of descriptions used to identify students with

exceptional learning conditions. An IPRC may identify students according to the challenges in the following areas: Behaviour; Communication (Learning Disabled, Autistic, Language Impairment, Hard of Hearing); Intellectual (Gifted, Mild Intellectual Disability, Developmental Disability); Physical (Blind-Low Vision, Physical Disability); and Multiple disabilities.

Under the *Education Act* (1990), the IPRC is the body that decides whether a student is an exceptional pupil and, if so, determines what type of educational placement is appropriate. The IPRC is composed of at least three persons, one of whom must be a principal or superintendent of education of the board.

An *individual education plan* (or IEP) is a working document that describes the special education program and/or services required by a particular student, based on a thorough assessment of a student's strengths and needs that affect her/his ability to learn and to demonstrate learning. The IEP is a record of the particular accommodations and modifications from the expectations for the age-appropriate grade level in a particular subject or course, as outlined by the Ministry of Education. The IEP is an accountability tool for the student, the student's parents, and the educators who have responsibilities under the plan for assisting the student to meet the stated goals and learning expectations as the student progresses through the Ontario curriculum.

The terms *principal* and *administrator* (used interchangeably in this study) refer to the school site administrative role defined in the *Education Act* (1990). Principals' duties are to organize and manage the school; be in charge of and supervise the instruction of pupils; and maintain proper order and discipline of pupils.

A *professional learning community* (or PLC) s defined as a "group of people who take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems, and perplexities of teaching and learning" (Mitchell & Sackney, 2000, p. 9). PLCs are guided by their commitment to student learning; a culture of collaboration and camaraderie; and a focus on results (DuFour, 2004).

Special Education Resource Teachers (SERTs) are classroom teachers with training in Special Education. SERTs work with many students, including those who have been identified as exceptional through an IPRC as well as those who experience difficulties in school but have not be identified. They assist students in a variety of placements ranging from regular class with indirect support to a full-time special education class. In an inclusive education model, SERTs play a critical role for regular classroom teachers by helping them develop and deliver programs for students with exceptionalities (Santrock, Woloshyn, Gallagher, Di Petta, & Marini, 2007).

Scope and Limitations of the Study

Four elementary school principals from three southern Ontario school boards participated in the study. Participating school boards' supervisory officers responsible for special education provided lists of elementary school principals who were considered reputable inclusion leaders for students with exceptionalities. The researcher randomly selected the participants from these lists and the findings are limited by this regional setting. Refer to chapter 3 for a full description of the participant selection process.

The study's qualitative research design documented participants' personal data and experiences as exemplary inclusionary leaders within their school communities, and

it is necessary to address this methodology's limitations. The participants were recommended by their school boards' senior staff (who are responsible for special education) due to the participants' excellence as leaders of inclusion within their respective PLCs. Because the study documents the characteristics and experiences of only four exemplary participants who are proven leaders of inclusion, it consequently limits the ability to generalize its results to the greater Ontario elementary school principal population.

Outline of the Remainder of the Document

Chapter 2 provides a review of related literature, beginning with a historiographical examination of the principal's role and responsibilities in PLCs. The chapter then discusses inclusive cultures in schools and examines PLCs and the principal's role as a leader of inclusion.

Chapter 3 outlines the study's methodology and procedures for data collection and analysis. The chapter also discusses site and participant selection and details the study's instruments, limitations, and credibility.

Chapter 4 presents the study's findings according to the major themes revealed by the analysis of qualitative data. The themes were coded and organized into specific headings based on the study's findings.

Chapter 5 reintroduces the study's central focus and briefly summarizes the methodology and findings. The chapter discusses the findings in relation to the background of the problem, research questions, and review of literature. The chapter concludes with implications for practice, theory, and future research.

CHAPTER TWO: REVIEW OF RELATED LITERATURE

This chapter presents a review of literature relating to the role of the principal as an inclusionary leader. This chapter is divided into five sections. The first section begins with an examination of the role of the principal. The second section provides an overview of leadership styles which would be associated with the role of the principal. The third section discusses the principal's role in professional learning communities. The fourth section focuses on inclusive settings in schools. The fifth and final section highlights the role of the principal as an inclusionary leader in a school's professional learning community.

The Role of the Principal

In Ontario, the term *principal* refers to the administrative role that is defined in the *Education Act* (1990). According to the *Education Act*, the principal is responsible to organize and manage the school, to be in charge of and supervise the instruction of pupils, and to maintain proper order and discipline. This illustrates the primary responsibilities of the principal and encompasses all other tasks that a principal performs habitually, and that can be derived from these foundational components (Brown, 2004). According to the Ontario College of Teachers, principals are

> Proactive, reflective, collaborative educational leaders. They create and sustain school and system cultures that enhance student learning and achievement including the cognitive, character, social, physical, and spiritual development of all students. Principals apply knowledge and skills with integrity, courage, wisdom and positive attitudes. (OCT, 2009, p. 1)

The literature suggests that the role of the principal has become increasingly more dynamic and complex. For example, the number of responsibilities of the principal have

grown substantially over time (Zollers & Yu, 1998) and the extent of time commitment is

substantial (Williams, 2002). This dynamic was documented in the first substantial

investigation into the role of the principal in Wolcott's (1973) ethnography, *The Man in

the Principal's Office*. Over the past four decades, numerous studies have depicted an

enduring redefinition of the role of the principal (Bénard & Vail, 2002), including the

recognition that since Wolcott's (1973) publication the position of principal is held by

both men and women.

Recently, the principal's key duties have been delineated in the following

categories: (a) client-related duties; (b) staff-related duties; (c) managerial-related duties;

and (d) facility-related duties (Gupta, 2009; Mertz & McNeely, 1999; Scoggins &

Bishop, 1993). Client-related duties include engaging directly or indirectly with students,

parents, and members of the community. The tasks associated with principals' client-

related duties include: student discipline, attendance, supervision (hallways, lunchroom,

busing, standardized testing), counseling, community events, new student orientation,

student council, student promotion, student observation in class, awards, graduation,

school spirit, extracurricular activities, school photos, report cards, checking restrooms,

communications, truancy counseling, special education compliance, lockers, care agent,

building tours, students services, textbook rental, vocational education, and teaching.

Among all of these client-related duties, student discipline remains the defining role of

the vice-principal (Gupta, 2009).

Staff-related duties include interacting with teaching faculty, support staff, and

school board and business personnel. Staff-related duties may also include: interviewing,

motivating, observing, evaluating, supervising, training, inducting, mentoring, and

listening to teachers (Gupta, 2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993).

Principals also consult with external professionals including school psychologists or

speech pathologists and respond to inquiries. They prepare teacher handbooks, supervise

the guidance functions of a school, and chair and attend meetings. Administrators also

provide leadership for their staff in the areas of curriculum and instruction (Gupta, 2009).

Managerial-related duties include business-related tasks and paperwork.

Managerial-related duties for the principal range greatly. The following is a lengthy but

not exclusive list of managerial-related duties: taking inventory, overseeing the school

parking lot, scheduling fire drills, making announcements, compiling monthly/yearly

reports, preparing supervision duty schedules, organizing fundraisers, serving on the

school council, drafting emergency contingency plans, budgeting the finances, liaising

with neighbouring schools and transitioning students efficiently, attending administrator

meetings, scheduling exams, innovating, overseeing school opening/closing exercises,

maintaining a school calendar and timetable, ensuring adherence to school/district/Ministry

policy, serving as a change agent and ethical model, and filling pop machines (Gupta,

2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993).

Lastly, facility-related duties involve tending to the needs of the school site.

Facility-related duties include: overseeing building operations, planning and maintenance

(Gupta, 2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993). Collectively, these

diverse tasks require the administrator to exercise a variety of skills and to interact with

the various members of the educational community (Gupta, 2009).

Within these four categories of duties, the principal also has specific mandated

responsibilities with regard to overseeing the education of students with exceptionalities.

Regulation 181/98 (Ontario Ministry of Education, 1998) states that the principal: (a) ensures that IEPs are completed within 30 school days of a student's placement in a special education program; (b) ensures that the recommendations of the IPRC (with respect to special education programs and services such as support personnel, resources and equipment) are taken into account in the development of the IEP; (c) ensures that consultation with community agencies and postsecondary institutions is conducted as part of the preparation of a transition plan for students who are 14 years of age or older and who are not identified solely as "gifted"; (d) ensures that a copy of the IEP is provided to the parents and to the student, if the student is 16 years of age or older; and (e) ensures that current IEP is stored in the Ontario Student Record, unless a parent of the student objects in writing. In addition to these mandated responsibilities, the principal also:

> (a) assigns to one teacher the responsibility for *coordinating* [not developing] the student's IEP; (b) facilitates collaborative planning, evaluation, and updating; (c) signs IEPS within 30 school days of a student's placement in the program; (d) ensures that IEPs are implemented and that, as part of implementation, the student's learning expectations are evaluated and updated at least once every reporting period. (Ontario Ministry of Education, 2004, p. 17)

Leadership Styles

Literature, describing the varying leadership styles associated with the role of a principal, identify both style – the leader's attitudes and mannerisms, and behavior – the leader's responses and actions (Kikot, 1990). This following section will discuss leadership style. The behaviours of leaders within a professional learning community model, including visioning, modeling, creating an affective and trusting organizational

climate, delegation of responsibilities, and instructional leadership, will be examined in the subsequent section.

Leadership style is a critical consideration with regard to how one approaches the role of principal. There is a continuum in the literature with regard to how the role of the school leader fits within various organizational models. Referring back to Plato's classical political theory in the *Republic*, Plato theorizes that a leader may lead his or her organization as a *tyrant* or *democrat*. This stylistic distinction for leaders is still relevant today in organizational theory. Within the last four decades, Weber's (1968) bureaucratic model (originally published in the late 1800s and early 1900s), argued that a purely bureaucratic or "monocratic" type of administrative organization is capable of attaining the highest degree of efficiency in carrying out imperative control over others. Weber's writings on rationalization and the human capacity to control workers through institutionalized discipline continued to influence organizations (including elementary schools) in the 1960s, and into the present day, resulting in a particular type of leadership style for administrators.

In response to Weber's bureaucratic model, McGregor (1960) proposed a model of original human relations, *Theory X and Y* model in which he incorporated Maslow's (1954) hierarchy of needs theory by suggesting that a leader manages an organization by assuming that the workers are either satisfied or dissatisfied with their work. This was a departure from organizational theory based upon Weber's writings as McGregor emphasized the importance of the worker's job satisfaction to maximize productivity. This paradigm shift incorporated humanistic qualities of Maslow's hierarchy of needs which McGregor applied to his organizational theory.

Ouchi's (1981) *Theory Z* builds upon McGregor's earlier work by suggesting that established workers are the key to the organization's productivity. According to Ouchi, Theory Z management promotes stable employment, high productivity, and a greater degree of employee job satisfaction and morale. These diverse leadership models represent the breadth of leadership approaches to which a principal may subscribe. This ranges from Weber's hierarchical, bureaucratic structure to an organization where many individuals subscribe to a common vision and partake in decision-making.

Organizational theory literature describes differences in the styles leaders may utilize. In their classic study, Lewin, Lippet, and White (1939) found that leadership styles could be classified into three broad categories: *autocratic*, *democratic*, and *laissez-faire*. In an *autocratic* model, the leader determines all policies for group members and details the methods of goal attainment. In a *democratic* model, the leader encourages the group to develop the organization's policies. In a *laissez-faire* model, the organization has complete freedom in terms of policies and goal attainment. Their research, determined that the most effective leadership style was democratic.

This work was revisited by Likert (1967) who identified four leadership styles with regard to decision-making in his prominent studies investigating supervisors and team members in an American insurance company. He placed the styles on a spectrum ranging from *exploitive-authoritarian*, *benevolent-authoritarian*, *consultative*, to *participative*. Likert theorized that as leaders' characteristics moved away from exploitive-authoritarian to participative, the organization became less focused on conformity and the use of control methods such as threats. Thus, the organization moved towards members engaging in the dialogue and decision-making process. Communication

channels in the organization are also opened and more fluid as the leadership style moves towards participative, including a reciprocal flow of information downward as well as upward. This also results in a broadening or 'flattening' of a traditional hierarchical pyramid where increased organizational members are enfranchised to participate in dialogue and decision-making responsibilities. This flow of information is a rare occurrence in authoritarian organizations.

Lastly, leadership styles were researched recently by Goleman, Boyatzis, and McKee (2002) who examined leadership styles in terms of emotional intelligence. Goleman et al., who drew from decades of analysis within world-class organizations, describe six leadership traits including: the *visionary leader*, the *coaching leader*, the *affiliative leader*, the *democratic leader*, the *pace-setting leader*, and the *commanding leader*.

Goleman et al. suggest that the most effective leaders act according to one or more leadership styles and skillfully maneuver their style depending on the circumstance. They argue that the first four leadership styles (visionary, coaching, affiliative, and democratic) "create the kind of resonance that boosts performance, while [the next two styles] pacesetting and commanding—although useful in some very specific situations, should be applied with caution" (p. 53). These four leadership styles (visionary, coaching, affiliative, and democratic) promote the emotional intelligence competence of empathy. For instance, when describing democratic leadership, Goleman et al suggests that empathy "plays a role in democratic leadership, especially when the group is strongly diverse. Without the ability to attune to a wide range of people, a leader will be prone to miscues" (p. 69). Consequently, if a leader uses pacesetting or a commanding leadership

style, they risk creating dissonance rather than resonance within the organizational culture. Goleman et al. incorporate the philosophy of emotional intelligence when characterizing the type of leadership that produces the most effective organization. They explain that emotionally intelligent leadership motivates, inspires, and arouses passion and enthusiasm and keeps people committed to the vision of the organization.

Where do elementary principals who are inclusive leaders within their schools' professional learning communities fall in this range of organizational models? This will be explored in the subsequent section.

The Role of the Principal in Professional Learning Communities

After discussing the role of the principal and the leadership styles that he/she may subscribe to, it is important to next discuss the role of the principal in professional learning communities.

Professional Learning Communities

The conceptualization of professional learning communities emerged from business theories that focused on organizational learning (e.g., Argyis & Schön, 1978; Senge, 1990). Argyis and Schön's (1978) organizational model suggested that individuals of organizations come together as a committed group of learning agents, where members are involved in the decisions that affect them; this is described as a learning organization. These individuals would participate in the organizational learning capacity and the organization's overall ability to learn through practices of inquiry and reflection.

Senge (1990) further developed these ideas and articulated that a learning organization is one that works collaboratively towards a common vision. Senge (1990) writes that "building learning organizations involves developing people who learn to see

as system thinkers see, who develop their own personal mastery, and who learn how to surface and restructure mental models, collaboratively" (p. 367). Senge reinforced the need for shared vision and collective capacity to maximize the success of the organization by using specific examples from business (Marshall, 2007).

These organizational practices were then applied in education literature. Theorists from the education sphere postulated that the concept of learning organizations would be appropriate for sustained school improvement (DuFour & Eaker, 1998; Marshall, 2007). Transferring the model from business to education required a change in nomenclature from organization to community, which emphasized the mission of an active teaching and learning culture (DuFour & Eaker, 1998; Mitchell & Sackney, 2001). This change also required a corresponding cultural change for educators from a traditional isolated culture to one that was open and encouraged collaborative dialogue (DuFour & Eaker, 1998; Marshall, 2007). Accordingly, a professional learning community (PLC) is defined as a "group of people who take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems, and perplexities of teaching and learning" (Mitchell & Sackney, 2000; p. 9). PLCs are guided by three big ideas: a commitment to student learning, a culture of collaboration and camaraderie, and a focus on results (DuFour, 2004).

Although membership within the professional learning community is allegedly equal, principals unquestionably are prominent members within these communities. DuFour (1991) articulates the clout that principals utilize when taking part in school-improvement efforts: "Principals typically function as gatekeepers for change and innovation, and the eventual outcome of a staff development initiative often rests upon

the guidance and support furnished by the principal" (p. 9). This power structure within

PLCs in elementary schools reveals the necessity for a principal who has a positive

attitude towards inclusion to ensure inclusion of students with exceptionalities is a

priority for school improvement efforts.

Principals who take an active role in these professional learning communities,

through creating and maintaining their value in the overall staff development and school

improvement needs of the school, foster a vibrant staff who are determined to work

together to analyze and improve their teaching practices. DuFour (2004) points out that

although the research has long substantiated that collaborative cultures such as

professional learning communities are beneficial for school improvement and student

success, teachers are still reluctant to work together. Yet, when "teachers work in teams,

engaging in an ongoing cycle of questions that promote deep team learning…this

process, in turn, leads to higher levels of student achievement" (DuFour, 2004, p. 9).

Principals who foster a culture among the teaching staff that embraces collaboration will

experience the benefits of social learning which is a vital element needed for school

improvement measures. Through professional learning communities, schools can work

collectively to improve teaching practices and implement or review initiatives such as

inclusive education.

A professional learning community promotes collegiality amongst its members to

focus on student learning and the ultimate result of this learning (DuFour, 2004). There

are several characteristics that are generally exhibited in schools that are considered

reputable examples of PLCs. The following section discusses the essential processes that

elementary school principals utilize to steer their organizations: visioning, trust,

delegation of responsibility, and instructional leadership (Bolam, McMahon, Stoll, Thomas, & Wallace, 2005; Mitchell & Sackney, 2000).

Visioning

In order for principals to be effective leaders in their school community, they need a clear and concise vision to guide the organization towards intended goals (Bennis & Nanus, 1985). DuFour (1991) suggests that it is not possible to carry out the other responsibilities of leadership without knowing where "the organization is going and how it is going to get there" (p. 16). Further, Burns (1978) recommended that leaders should first elucidate their own goals before attempting to influence others. Goleman et al. (2002) add that leaders can help their organizations to unearth an ideal vision by beginning "with a close scrutiny of themselves—of their personal dreams and of their ideal visions for the organizations that they lead" (p. 204). Ideally, through visioning and shared goals, a leader is able to chart the course for the organization.

When principals lead through shared visioning they need to rely less on rules and protocols (DuFour & Eaker, 1998) since having a common vision focuses the energy of the organization (Senge, 1990). Consequently, a common sense of purpose and direction for the members of the organization is built. This collective purpose and direction reflects the organization's mission, the current state of the organization, and the organization's goals. A common sense of purpose also fosters members' ongoing dedication and professional development (Bolam et al., 2005; DuFour & Eaker, 1998; Lambert, 2003; Mitchell & Sackney, 2000; Stoll et al., 2006).

Administrators in elementary school institutions influence both the direction and tone of the school (Mitchell & Castle, 2005). Mitchell and Castle (2005) found that what

principals believe to be a priority transfers to all members in the professional learning

community of the school. With this finding in mind, it is paramount for administrators to

promote inclusion as a core value for the school community to ensure that the needs of all

students with exceptionalities are met and that this philosophy runs throughout the school.

Modeling

Complementary to the leader's ability to develop and present his/her vision for the

organization, is his/her ability to model intended behaviours through his/her actions and

personality (Shapiro, 2000). The colloquialism "you need to walk the walk and talk the

talk" sums up the act of modeling and supporting inclusive practices. DuFour and Eaker

(1998) elaborate on this necessary skill and how it is associated with the visioning for the

organization: "Principals of learning communities establish credibility by modeling

behavior that is congruent with the vision and values of their school" (p. 193). For

example, Goleman et al. (2002) cite that in a meeting a leader might have to respond with

sensitivity to a disgruntled staff member. By dealing with the confrontation with

empathy, and acknowledging the staff member's emotional reality, a caring attitude will

build a sense of trust and belonging that underscores the shared mission. Thus, by

modeling the intended behaviour for the organization, the leader can bring attention to

and solidify the vision of the organization as well as fostering a shared trust and purpose.

Creating an Affective and Trusting Organizational Climate

Similar to modeling, the ability to foster trusting relationships within an

organization is important for principals to be effective leaders in their schools (Goleman

et al., 2002; Mitchell & Castle, 2005; Shapiro, 2000). Mitchell and Castle (2005)

elaborated on this valuable asset in terms of a leader's personality when they researched

how administrators of professional learning communities invested time in creating affective climates in their schools (for both teachers and students). The principal participants stated when they paid attention to the affective climate, they believed that it offered teachers and students a nurturing environment, helped everyone to feel good about coming to school, and provided the foundation for the cognitive climate (Mitchell & Castle, 2005). Mitchell and Castle further state that principal participants strongly believed in the value of trust: "If they [teachers on staff] don't trust you, then they won't work for you or with you. You are snookered before you begin" (p. 421). This finding eloquently explains that an administrator needs to have a leadership style that promotes collaboration and fosters a trusting relationship between all stakeholders. This is fundamental in order to establish an inclusive environment for students with exceptionalities. This current study will further investigate the approaches that leaders of inclusion have used to build a positive rapport with their staff and to foster a productive and supportive learning community.

Delegation of Responsibilities

Another leadership behaviour that frames the role of the elementary school principal is the need to delegate responsibilities within the school organization. Levine and Lezotte (1990) emphasize that, "too many principals are trying to 'do it alone'" (p. 71). With the substantial responsibilities and paperwork occupying their time, principals need to outsource various tasks as well as the ownership of those tasks to ensure productivity within the school organization. Crow (1999) further suggests that shared leadership and power is necessary for creating and maintaining collaboration in schools.

Sharing responsibilities in the school is also connected with realizing the vision and purpose of the school. Levine and Lezotte (1990) suggest that delegation of power is necessary to empower individuals to assist in the task of school improvement. They state:

> It is unlikely that widespread school improvement can be successfully begun, let alone sustained, without a broad-based empowerment of all those who are stakeholders in the culture of the school. When we find successful examples of groups of schools that are changing, we generally see widespread 'ownership' of both the mission and strategies for change. (p. 71)

Mitchell and Sackney (2000) argue that shared vision and purpose in organizations provides individuals with power and provides direction as they follow through on their delegated responsibilities.

Instructional Leadership

Being an instructional leader is another essential element to effectively carry out the role of principal. A principal who is an instructional leader is "an educational leader who promotes the success of all students by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth (Council of Chief State School Officers, 1996, p. 12). In accordance with the importance placed on the instruction of pupils, the focus of instructional leadership has shifted from *teaching* to *learning:*

> By concentrating on teaching, the instructional leader of the past emphasized the inputs of the learning process. By concentrating on learning, today's school leaders shift both their own focus and that of the school community from inputs to outcomes and from intentions to results. Schools need principal leadership as

much as ever. But only those who understand that the essence of their job is

promoting student and teacher learning will be able to provide that leadership.

(DuFour, 2002, p. 15)

Principals need to provide opportunities for teachers' professional growth and

development in order to improve student achievement and build school capacity (Guskey,

2003; Youngs, 2001). Newmann, King, and Youngs (2000) define school capacity as,

"the knowledge, skills, and dispositions of individual teachers, the strength of the

school's professional community, the extent to which programs are coherent, the

administrative leadership, and the quality of resources" (p. 3). Mitchell and Sackney

(2000) document the principal's role in providing formal and informal learning

opportunities for their staff which could include: mutual observation and feedback,

inquiry of students' works, action research amongst colleagues, and networking within

the learning community and beyond the school community. Although principals are not

identified in the research as the primary provider of instructional knowledge (Mitchell &

Sackney, 2006), they are often identified as the facilitator by serving as both a resource

provider and an instructional resource (Smith & Andrews, 1989).

A method that principals may utilize to promote effective pedagogy that enables

diverse students to succeed is to be an instructional leader and influential member within

the school's professional learning community. DuFour (2004) describes the functional

responsibility that professional learning communities (PLCs) have to implement new

initiatives and evaluate the successes of existing practices: "The powerful collaboration

that characterizes professional learning communities is a systematic process in which

teachers work together to analyze and improve their classroom practice" (p. 9). The PLC

is a realistic option for an elementary school principal to employ when creating or maintaining an inclusive learning environment.

The role of the principal has been redefined often throughout the past few generations. Even though leadership styles and behaviours have evolved, the main responsibilities have remained constant: to organize and manage the school; be in charge of, and supervise the instruction of pupils; and to maintain proper order and discipline of pupils (*Education Act*, 1990). It has been documented that the role of the principal as an instructional leader is effective when a professional learning community organizational model is utilized (Bolam et al, 2005; DuFour & Eaker, 1998; Gallagher & Grierson, 2011; Mitchell & Sackney, 2000; Senge, 1990). In this manner, the principal models behaviour that is harmonious with the school's vision, draws attention to and solidifies the vision of the organization and fosters a collaborative culture based on shared trust and purpose.

Mitchell and Sackney (2006) found that successful principals, "focused their actions on teaching and learning, and they involved everyone who had a stake in a particular decision or initiative" (p. 637). Mitchell and Sackney (2006; pp. 637-638) note that each successful school community had a powerful administrative presence

> when the principal takes an active role in building the learning community, it signals to the staff, students, and community that this is an important and worthwhile enterprise, and the construction moves forward with sufficient support and status to bring the learning community to reality. (2006, pp. 637-638)

This current study will focus on the principal's role as an inclusionary leader for students with exceptionalities and document whether these principals are influential members in a

professional learning community that is able to foster a shared vision through collaboration.

Inclusive Cultures in Schools

Inclusive education refers to the fundamental practice that all students attend their neighbourhood schools in age-appropriate classes and are supported to learn, contribute and participate in all aspects of the life of the school (Inclusion International, 2009; Porter, 2008). Bunch and Valeo (2004) describe inclusion as the process of the classroom teacher taking ownership of students with special needs. In this regard, although inclusion is often associated with normalization, integration, and mainstreaming (Mittler, 1995), inclusion is more than a procedure or the act of amalgamating two pedagogical frameworks together. It is a conceptualization for social justice (Frattura & Capper, 2007; Marshall & Oliva, 2010; Theoharis, 2009; Villa & Thousand, 1995). Inclusion guarantees equality for all within society. Each person has a right to equitable conditions whether it is in the classroom, workplace, or the greater community. In theory, inclusion provides opportunities, breaks down barriers, and ensures accessibility for all members of the community (Frattura & Capper, 2007; Theoharis, 2009).

Although educational legislation guarantees access to education for all school aged children in Ontario, the practice of inclusive education has yet to be mandated. The web of policies (Malen, 2005) which safeguards students' access to education does not specifically prescribe the pedagogical approach to educating students with exceptionalities. This decision-making authority regarding placements for students with exceptionalities is left to administrators and school board personnel. Currently, placements for students with exceptionalities ranges from regular class with indirect

support from a Special Education Resource Teacher (SERT) to a full-time special education class (Weber & Bennett, 2004). Placement decisions are at the heart of the debate for inclusive education.

Administrators play a pivotal role in the decisions made during IPRC meetings. Principals who have positive attitudes towards inclusion are more inclined to choose an inclusive setting when it comes to special education placement decision making (Evans, Bird, Ford, Green, & Bischoff, 1992; Praisner, 2003; Rude & Anderson, 1992; Horrocks et al, 2008; Hadjikakou & Mnasonos, 2012). Praisner (2003) documented that principals' positive attitudes towards inclusion are impacted by factors such as their years of experience as a SERT and as an administrator, their experience interacting with an individual with an exceptionality (outside of the profession), and their professional development training. Recent studies reveal that principals support inclusion of students regardless of the severity of their disability, ranging either mild or severe (Horrocks et al, 2008; Hadjikakou & Mnasonos, 2012). Horrocks et al. (2008) found that an indicator for predicting the inclusiveness of principals (which was also correlated to increased placements for all students with exceptionalities in inclusive setting) was whether they believed that children with autism could be included in a regular education classroom. Thus, for inclusive education to flourish across the school system, principals need to actively support inclusive placements when making IPRC decisions. An important element of inclusive education is a school climate that promotes a mutual feeling of "belonging" for all students, parents, faculty and support staff, administration and members of the community. The environment and culture of the school setting has a direct impact on the acceptance of students with exceptionalities by all members of the

organization (McDougall et al., 2004; Riehl, 2000). Riehl (2000) purports that principals who promote forms of teaching and learning that enable diverse students to succeed, and who mold school cultures that embrace and support diversity, are principals who help to create practices within schools that address the needs of diverse students. In order for principals to be effective leaders of inclusion they need to foster new meanings about diversity and reach out to the broader community (Riehl, 2000). In sum, the role of the school principal is pivotal for fostering new meaning, promoting inclusive school cultures and instructional programs as well as building relationships between schools and communities.

Fostering a sense of belonging is vital to move from a theoretical understanding to a practical application of inclusive education. Winzer (2005) and Coleman (2001) contend that many teachers are genuinely concerned about enhancing all students' academic, social, and emotional success and the acceptance of students with exceptionalities in inclusive settings. An inclusive school culture that reinforces mutual understandings supports the social acceptance of all students in the school community. A principal is a key figure in fostering social acceptance and a feeling of belonging in the school community (Slee, 2006; Walther-Thomas, Korinek, McLaughlin, & Williams, 2000; Zollers, Ramanathan, & Yu, 1999). Educators who promote inclusion tend to be empathetic towards their students' needs and these insights can be used as a springboard by conscientious administrators (Shapiro, 2000). Creating a school community that embraces diversity, fosters respect and belonging and accepts individual differences diminishes incidents involving harassment and bullying (Porter, 2008).

Students with and without exceptionalities socially and academically benefit from inclusive education. In particular, Porter (2008) and Bunch and Valeo (1997, 2004) have documented the positive effect that inclusive education has for students without special needs. They found that with an inclusive education model in place, students without special needs were also benefiting by having access to services and supports that they would not have had otherwise. Further, Porter and Stone (1998) described how in inclusive schools, students without special education needs (and those not yet formally identified) may receive additional supports and services that used to be restricted to exclusive placements including having access to assistive technology that may benefit all learners in a classroom.

Social benefits are accrued by students both with and without exceptionalities in effective inclusive school environments. For instance, for students without exceptionalities in inclusive schools, positive results have been documented in terms of an increase in advocacy and tolerant attitudes (Farrell et al, 2007; Norwich & Kelly, 2004). For students with exceptionalities in inclusive schools, findings vary based on the type of disability, type of inclusive setting, and the age of the students; however, in general, when students with exceptionalities are educated in regular classroom settings with their same-age peers, they do not experience serious social difficulties beyond those experienced in another placement setting (Farrell et al, 2007; Norwich & Kelly, 2004; Wiener & Tardif, 2004). Wiener and Tardif (2004) found that students with learning disabilities developed more satisfying relationships with their best friends, were less lonely and had fewer problem behaviors when they were educated in an inclusive learning environment than students who were educated in self-contained special

education classes demonstrating the social benefits of a regular classroom for students with exceptionalities and their peers.

Another contested issue is the perceived effect that inclusive education has on students without exceptionalities as there is a school of thought that inclusive education could be detrimental to them. Bunch and Valeo's (1997) study found "no decline in the academic behavioural performance of regular students educated in inclusive classrooms compared to those in non-inclusive settings" (p. 82). A more recent review of the literature over the past decade also confirms that including students with exceptionalities in the regular classroom does not have a negative impact on the academic achievements of students without exceptionalities (Farrell et al., 2007; Kalambouka et al, 2007). Interestingly, Farrell et al. (2007) state that socioeconomic status has a greater impact than inclusion on students' overall academic success.

Relationship Between the Administrator and SERT

Special education resource teachers (SERTs) are vital members within a school community and are integral to ensuring an inclusive education model. SERTs interact directly or indirectly with students who are formally identified or non-identified students who require additional remediation, parents, teachers, support staff, administration, board staff, and professionals including psychologists and speech and language pathologists and oversee the development of essential documents including independent education plans (IEPs) and identification, placement, review committees (IPRCs). SERTs assist students learning in a variety of placements ranging from regular class with indirect support to a full-time special education class. It is obvious that SERTs are influential members in a school organization and often viewed with increased authority as compared to a regular

classroom teacher.

The role of a SERT looks different in an integration school model as compared to an inclusive school model. In an integration school model, students with exceptionalities receive support and remediation outside the regular classroom during periods of the day (Bunch & Valeo, 1999). However, this differs from an inclusive education model, where SERTs work alongside the regular classroom teachers, by assisting them to develop and deliver programs for students with exceptionalities within the regular classroom (Santrock et al., 2007). The SERT's role in inclusive settings is seen as one of a leader that provides teaching methodology and pedagogical support as well as resources to the classroom teacher, to assist in the delivery of an accommodated or modified program. For the SERT, the transition from an integrated model role to an inclusive education model role has been a difficult one with respect to the complementary roles of the administrators and teachers (Perner, 1991; Porter & Stone, 1998). Conversely, in recent literature, the SERT has been documented lately as typically having a more positive outlook and attitude towards inclusive education than their classroom teacher colleagues (Woolfson, Grant & Campbell, 2007; McGhie-Richmond, Irvine, Loreman, Cizman, Lupart, 2013). Woolfson et al (2007) found that SERTs have a more positive perspective about the abilities of students with exceptionalities. This transformation in the literature may also reflect the increased and intensive training of SERTs resulting in increased confidence of delivering an inclusive program (Subban & Sharma, 2006). Although the literature has shifted in terms of the attitudes of SERTs, research has remained constant with respect to the duties of SERTs in the supporting of the classroom teacher (McGhie-Richmond et al,

2013). This current study will investigate the dynamic relationship between the elementary school principal and the SERT regarding the delegation of responsibilities.

Putting Theory to Practice

It is important to note that transitioning a school towards an inclusive model is likely to involve certain implementation challenges. Porter and Stone (1998) suggest "First, the teachers, administrators, and parents need to accept the reality that creating inclusive programs in schools is a major challenge to everyone concerned—students, parents, teachers, and administrators" (p. 231). Theoharis (2009) supports the recommendation that it is vital to bring the community involved in the inclusion process together. Theoharis researched a group of principals who implemented a social justice leadership style that is similar in core beliefs to an inclusive learning community:

> The principals opened their offices daily to parents and teachers. They stood
>
> outside every day before school, walked the halls, supervised lunch, monitored
>
> the playground, played games with children at recess and often could be found
>
> outside at the end of the day. They knew that along with having good teachers, the
>
> best schools are deeply connected to families. (2009, p. 3)

Secondly, the principal needs to recognize the importance of supporting teachers in their role of delivering an inclusive program (Frattura & Capper, 2007; Porter & Stone, 1998). This might require such support as release time for professional learning. Lastly, the principal should recognize the need to have flexible goals when implementing an inclusive school policy. Porter and Stone (1998) found in their research investigating educators in New Brunswick that "although they were committed to inclusive education for students with disabilities, the teachers, administrators, and parents made the conscious

decision to declare that they did not purport to have a 'program' or a 'process' that would immediately ensure success" (p. 231). It is necessary to plan regular meetings for all stakeholders involved including administration, teachers, support staff and members of the parental community to take time for mutual reflection and assess progress towards the intended goal of inclusion (Di Petta et al., 2010; Frederickson et al, 2007; Meijer, 2001). Formative review is an essential factor when transitioning a program, such as transitioning into an inclusive education model (Cambron-McCabe, Kleiner, Dutton, & Smith, 2000; Fullan, 1999; Riehl, 2000; Senge, 1990; Shadish, & Reichardt, 1987). When supporting the growth of an inclusive school culture it is vital to promote strong communication between all parties involved and to reinforce the targeted vision.

Role of the Principal as a Leader of Inclusion

The literature suggests that elementary school principals who embrace the role of an inclusion leader, as one who will guide the organization in creating and maintaining an inclusive learning environment believe that they are meeting the needs of all students (Frattura & Capper, 2007; Sapon-Shevin, 2003; Theoharis, 2009). The role of an inclusive leader includes leadership skills such as supporting and steering teachers towards the school's inclusive vision and the delivery of inclusive practices both inside and outside the classroom (DuFour, 1991; Mitchell & Castle, 2005). An inclusive leader also makes inclusion a decision-making priority, advocates for inclusive education within the school organization, models the school's inclusive mission, and "walks the walk and talks the talk" with regard to his/her own personal inclusion philosophy (DuFour & Eaker, 1998).

In order to bring a school vision to fruition it is necessary for the school leader to be committed to and model the intended behavior (Perner, 1991). In this vein, Praisner (2000, 2003) investigated the attitudes of principals towards inclusion. She found that principals' attitudes and values towards inclusion have a direct impact on their choice of an inclusive placement for students with exceptionalities. Specifically, principals with more positive attitudes toward inclusion were more likely to believe that less restrictive placements were most appropriate for students with disabilities. Attitudes are shaped by principals' previous personal experiences with an individual with a disability, and their professional development experiences. An implication of Praisner's research is that principals should have opportunities to observe effective principals in inclusive environments and then collaborate with one another to develop as inclusive leaders.

Since principals set the tone and direction of their school, it is fundamental that they encourage and support all members of the professional learning community to facilitate the inclusion of all students. The school principal is pivotal in promoting inclusive instructional programs as well as building relationships between schools and communities (Kugelmass, 2003: Lambert, 2003; Riehl, 2000). Riehl (2000) contends that in order for principals to be effective leaders of inclusion they need to foster new meanings about diversity that extend beyond to the broader community.

Some scholars advocate that there needs to be a philosophical and holistic approach, rather than solely a practical approach to inclusive education. Administrators are charged with the notion to view inclusion in the broader context of social justice, not as a placement decision or teaching paradigm for students with exceptionalities

(Frattura & Capper, 2007; Sapon-Shevin, 2003; Theoharis, 2009). From a holistic perspective, a school leader needs to have a positive attitude towards inclusion and a core belief that inclusive education is a human rights issue (Frattura & Capper, 2007; Sapon-Shevin, 2003; Theoharis, 2009).

Marshall and Parker (2010) argue that social justice leaders must also build and refine their skills in critiquing tradition and trite policy assertions. They suggest that principals look to other administrators whom they may consider social justice leaders to model their behaviour and leadership style:

> It requires [principals] to identify ways to lead with core beliefs and create organizational structures that promote social justice. They need to seek examples and learn from the practices of principals and superintendents who work with teachers, parents, and children to build schools that are connected to communities and that emphasize high performance for each child in a passionately committed and loving way. (p. 221)

Principals who lead and have a strong core belief about inclusion are regarded as credible in their schools (Goleman et al., 2002). Since elementary principals influence both the direction and tone of the school, what principals believe is a priority is thereby assumed by all members in the school's professional learning community (Mitchell & Castle, 2005). Specifically, when principals engaged in instructional leadership that focused on learning, it had an overall effect in the school-wide environment as opposed to when principals focused on other issues such as relationship building or student conduct (Mitchell & Castle, 2005).

A principal with a core belief, such as a commitment to inclusion, is challenged to promote inclusion as a shared mission for the staff. Thousand and Villa (1995) argue that "a school system can have a vision; a plan of action can be set into motion; yet, without incentives that are meaningful to each individual affected by the change, the outcome may be passive or active resistance rather than excited engagement" (p. 64). Although incentives are important, Sergiovanni (1990) explains that *extrinsic* incentives, including honours and financial rewards, can actually hinder change. By contrast, *intrinsic* incentives motivate people to action, through obligation, a sense of righteousness, or a feeling of commitment. A key consideration for inclusive leaders is to incorporate the vision of inclusion into a collective and mutually endorsed belief that includes *intrinsic* incentives which motivate the organization.

There is a direct correlation between the climate in the school and the leadership style of the principal (Frattura & Capper, 2007; Fullan, 1999; Hoy & Miskel, 2001). For example, Frattura and Capper (2003) maintain that:

> If the principal is autocratic, often teachers wait to be told what to do and shared vision and decision making do not occur. In addition, teachers function in ways that are similar to the principal, and students are taught in a traditional sit-and-get manner through a prescribed body of knowledge. Conversely, when the principal functions in a shared leadership capacity, staffs are better able to develop a common vision and to work cooperatively. (p. 84)

Frattura and Capper frame the argument that elementary school principals need to lead by example through modeling the type of behaviour they envision for their staff. With regard to the elementary school principal leadership style, a participatory or

collaborative style would be most beneficial for establishing an inclusive school. This leadership style would bring the staff together, forge a shared vision and understanding for the direction of the school, and thus encourage activism in the implementation rather than passivity.

In a unique study, Zollers and Yu (1998) elaborate on the importance of collaborative cultures as a result of a leader's organizational style. Zollers and Yu performed a single participant case study investigating a reputable inclusive principal who had a visual impairment. Zollers and Yu describe their findings with regard to leadership style: "Instead of depending on his authority and emphasizing his hierarchical role, Mr. Knight [pseudonym] emphasizes discussion and collaboration" (p. 758). Zollers and Yu add:

> Mr. Knight's administrative style generates respect, fosters collaboration and garners support from members of the school community. His disability has a strong influence on his perspective. …As a member of a minority, he has a different way of seeing reality, one that contrasts sharply with the traditional 'old boy' way of leading a school. (pp. 758-759)

Through discussion and collaboration, Mr. Knight was able to engage the school community to take ownership in the policy making and implementation stages.

It is also necessary for a principal to delegate responsibility within the learning organization. Shared responsibility correlates to the goals of shared visioning and a strong collaborative culture that builds capacity within the school organization. The process to create and maintain an effective inclusive environment requires a principal to

empower teaching faculty and support staff with responsibilities to exact a shared vision and to assist in the process of developing a thriving inclusive school.

In traditional organization models, the hierarchical structure often resembles a pyramid which Frattura and Capper (2007) depict in an Autocratic Organization Chart (see Figure 1). In terms of a school community, the pyramid has leaders at the top of the pyramid including the school board trustees, followed by the director of education and supervisory officers, then the principals, teachers and finally support staff. Frattura and Capper (2007) suggest that in terms of an effective inclusive leadership that places learning for all as a top priority, the traditional hierarchical structure is not a sufficient means of allocating resources and support to reach this mission.

Frattura and Capper (2007) state that when schools are aligned with inclusive principles that social justice is promoted in an *Integrated Comprehensive Service (ICS)* model,

> the typical organizational pyramid is inverted so that the child is first, teachers are second, the school principal is third and supports the teaching staff to enable them to do their best on behalf of each child, followed by central office administrators who assist building principals in the process of supporting teachers and students. The result is an entirely different reporting mechanism. Teachers report to students and families, school principals report to teachers, and central office administration reports to principals and teachers. In such a school, ICS principles and practices are used when making all decisions, instead of being based on educational politics, competing factions of stakeholders, and groups of parents that may unknowingly marginalize some children. (p. 32)
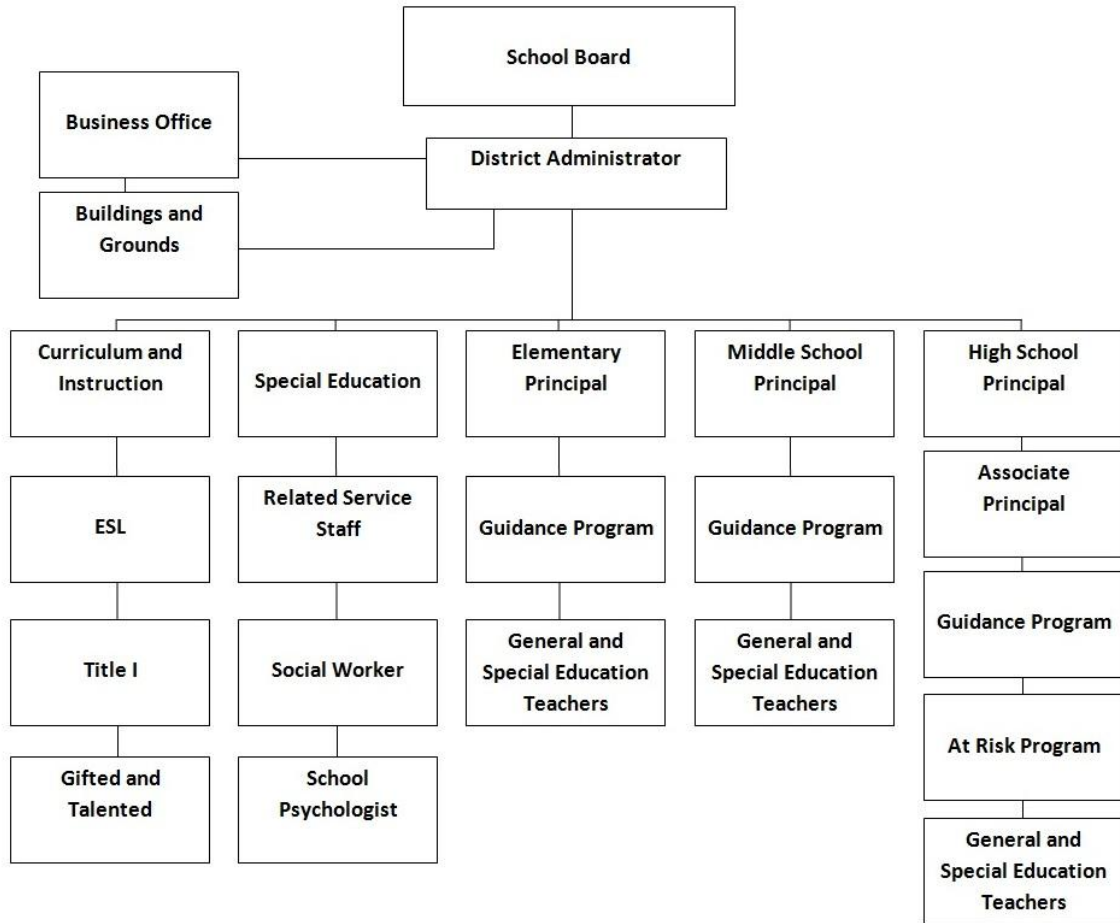
Figure 1. Autocratic organization chart.

Source: Frattura & Capper, 2007, p. 33.

Frattura and Capper conceptualize an appropriate model that exemplifies the flow of the traditional model for meeting the needs of all learners, including those students with exceptionalities (see Figure 2). When the pyramid model is inverted, the principal role transforms to one in which the primary goal is reporting to teachers to assist them in student learning instead of first reporting to their superior. Frattura and Capper's model outlines the need for educational leadership at all levels including principals, supervisory officers, and school board staff to take an active role in helping teachers to develop and maintain inclusive education practices. This inclusive model also reinforces the organizational principles of collaboration, discussion, and the role of the principal as an instructional leader in providing support and resources to teaching and support staff.

In Frattura and Capper's (2007) organizational model, the principal guides the teaching faculty and support staff to facilitate student learning. The principal, as a leader of inclusion, has an essential relational role to "facilitate a collective mobilization and distribution of social, political, and economic resources in special education" (Zaretsky, 2006, p. 100). Zaretsky (2006) found in her research that the practice of inclusive education necessitated that roles and responsibilities be flexible. One principal in her study suggested that

> that this necessitated an individual and collective attitudinal shift where the school leader, parent, student, and teacher positioned themselves as co-learners and not always the experts in any one particular school improvement process. Knowledgeable and skillful principals were, in his opinion, able to further nurture collaborative relationships and networks within this context of accountability. (p. 100)

Figure 2. Organizational structure for ICS and social justice.

Source: Frattura & Capper, 2007, p. 34.

In Frattura and Capper's (2007) organizational model, the principal guides the teaching faculty and support staff to facilitate student learning. The principal, as a leader of inclusion, has an essential relational role to "facilitate a collective mobilization and distribution of social, political, and economic resources in special education" (Zaretsky, 2006, p. 100). Zaretsky (2006) found in her research that the practice of inclusive education necessitated that roles and responsibilities be flexible. One principal in her study suggested that

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> and not always the experts in any one particular school improvement process.
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> nurture collaborative relationships and networks within this context of
> accountability. (p. 100)

Barriers to Social Justice/Inclusion

The barriers to social justice and obstacles that inclusive leaders face have come to light in the literature over the last two decades. Initially, Bunch and Valeo's (1997) groundbreaking research in the Canadian inclusion movement first advised inclusive educators of methods to advocate for inclusive education. Surprisingly, one of the potential barriers for teachers wishing to deliver inclusion during this time was actually the school principal. Bunch (1999) explains that the average school principal may understand and be fluent with regard to the integration model, where students would leave the regular classroom for remedial instruction from a SERT, but may not be well versed with inclusion. Bunch (1999) describes inclusion as a grassroots movement that

arose from the ranks of the front line workers and they advised teachers to overcome the

potential barrier of a resistant administrator and "let the principal know that you can

include students, that they will achieve both academically and socially at least as well as

they would in segregated environment, and that the education of the other students will

not suffer" (p. 90). He also advised teachers to continue this collaboration as they

implemented their inclusive program and "above all, don't keep your principal in the

dark. An informed principal is often a supportive, interested principal" (p. 91).

The role of principals has changed in terms of inclusive education over the past

decade, as witnessed through the Ontario Ministry of Education resources *Education for*

All (2005); *Learning for All: K-12* (2011) and policies such as *Special Education*

Transformation (Bennett & Wynne, 2006) and *Realizing the Promise of Diversity:*

Ontario's Equity and Inclusive Education (2009). Yet, the same strategies suggested by

Bunch and Valeo (1997 and by Bunch (1999)) to overcome resistance to inclusion in all

educators can still be applied today. All educators can use discussion and collaboration to

advocate their core belief for the urgency of inclusion to their peers and superiors.

Interestingly, Theoharis (2009) researched school administrators who acted as

social justice leaders and found that these leaders faced 'tremendous barriers' that needed

to be overcome when implementing and maintaining social justice in a school. Theoharis

described how these principals who were operating from a social justice model defied the

meta-narrative that principals should be technical bureaucrats (Brown, 2004) and

lockstep managers of the status quo (Oakes, Quartz, Ryan, & Lipton, 2002; Rapp, 2002;

Theoharis, 2009). Theoharis described these principals as ones who

bring a commitment to justice through leadership that was passionate, personal,

informed about equity, humble, and boundary pushing. These traits produced

resistance from other administrators and educational systems that did not value

this type of leadership or wholeheartedly support the principals' social justice

agenda. (p. 111)

The administrators in Theoharis's study faced resistance from every aspect of their

position: the job, themselves, their staff, the community, the school norms and structures,

district administration, the bureaucracy, colleagues, larger society, state and federal

regulations, and the principal preparation programs. "They faced unrelenting pressure.

They experienced a physical and emotional toll. They carried a sense of persistent

discouragement and often faced barriers at every turn" (Theoharis, 2009, pp. 111-112).

Theoharis's work has described the pressure of today's administrators who are facing

resistance of leading with a social justice paradigm.

The present study will assume the task of documenting the experiences of

recognized leaders of inclusion for students with exceptionalities. Do these leaders incur

challenges in their effort to bring their vision of inclusion to fruition?

Summary

Fostering the development and growth of an inclusive learning environment is a

complex task for elementary school administrators. The process involves purposeful self-

reflection with regard to one's leadership style and behaviours, and the ability to self-

evaluate his/her own vision, approach to modeling, delegation of responsibilities, as well

as skill to maintain mutual trust amongst co-workers. The process also involves

evaluating their role in the school's professional learning community, effectiveness to

implement school reform measures and to share a common vision with regard to

inclusion. A leader also needs to reflect upon the inclusive culture of the school itself by reappraising his/her own philosophy of inclusion and approach to advocating for inclusion, as well as the manner of supporting SERTs and the school community. Lastly, the principal needs to hone his/her personal mannerisms and style to be effective in the role as a leader of inclusion within the school's professional learning community.

This literature review commenced with the examination of the term *principal* as was defined according to the Ontario's *Education Act* (Statutes of Ontario, 1990). Next, the responsibilities of the administrative role were discussed as well as the specific mandated responsibilities with regard to overseeing the education of students with exceptionalities. Varying approaches to principal leadership styles and behavior were also discussed ranging from Weber's hierarchical, bureaucratic structure to an organization where individuals subscribe to a common vision and partake in decision making (1968). After discussing the role and leadership styles of elementary school principals, it was important to next discuss the role of the principal in professional learning communities. A professional learning community promotes collegiality amongst its members to focus on student learning and the ultimate result of this learning (DuFour, 2004). In this section the essential processes that elementary school principals utilize to steer their organizations were discussed: visioning, trust, delegation of responsibility, and instructional leadership (Bolam et al., 2005; Mitchell & Sackney, 2000).

Inclusive education was also defined in the literature review as the fundamental practice that all students attend their neighbourhood schools in age-appropriate classes and are supported to learn, contribute and participate in all aspects of the life of the school (Inclusion International, 2009; Porter, 2008). The placement of students with

exceptionalities ranges from regular class with indirect support from a SERT to a full time special education class (Weber & Bennett, 2004). Thus, placement decisions are at the centre of the discussion for the right to inclusive education. It was confirmed that school administrators play a pivotal role in these placement decisions. Principals are also instrumental in the fostering of a sense of belonging for all students within the school community. The academic and social benefits of inclusive education for student with exceptionalities as well as their peers who do not have exceptionalities were also discussed. It was also present in the literature that principals delegate increased responsibility to the SERT, and that the SERT acts as a resource to support classroom teachers in delivering inclusive education.

Lastly, the role of the principals as an inclusion leader was discussed. Principals set the tone and direction of their school, therefore, it is fundamental that they encourage and support all members of the professional learning community to facilitate the inclusion of all students. It was revealed that some scholars advocate that there needs to be a philosophical and holistic approach, rather than solely a practical approach to inclusive education. There is a direct correlation between the climate in the school and the leadership style of the principal (Frattura & Capper, 2007; Fullan, 1999; Hoy & Miskel, 2001). The principal, as a leader of inclusion, has an essential relational role to "facilitate a collective mobilization and distribution of social, political, and economic resources in special education" (Zaretsky, 2006, p. 100).

The proposed study strives to provide an in-depth view of exemplary principals in the role of leaders of inclusion. The data collected from exemplary inclusive principals regarding implementation and support of inclusion will be informative to all educators

and policy makers and assist other administrators to become more effective inclusionary leaders for their staffs and students.

The methodological procedures for carrying out the data collection and analysis for the study will be discussed next in Chapter 3. Subsequently, Chapter 4 will present the study's qualitative findings and survey results from the *Principal and Inclusion Survey*. The five themes are presented in narrative form. Lastly, Chapter 5 reintroduces the study's central phenomenon and provides a summary of the research methodology and findings. The findings are discussed as they apply to the background of the problem, research questions, and review of literature. The chapter concludes with implications for practice, theory, and for future research.

CHAPTER THREE: METHODOLOGY

This chapter explains the research design and methodological considerations for this study. The sample will also be discussed in this chapter as well as the process for collecting and analyzing the data. This chapter will conclude with a discussion of the limitations of this study.

Methodology

This study employed a qualitative research design methodology. When describing a qualitative research design model, Maxwell (2005) notes, "the strengths of qualitative research derive primarily from its inductive approach, its focus on specific situations or people, and its emphasis on words rather than numbers" (p. 22). This research documented inclusion leaders through their own interactions as well as through observations notes and reflections recorded by the researcher to substantiate how recognized leaders of inclusion perform and embody this essential role. Accordingly, this methodological framework adequately addresses the research problem to gain an in-depth perspective into the experiences of elementary school principals who are leaders of inclusion within their schools' professional learning communities. Examining the particularity and complexity of the four participants in a qualitative research model allowed the researcher to gain understanding of the important circumstances incurred as a function of the principal role while creating and maintaining an inclusive learning environment for students with exceptionalities in their schools. The researcher explored the central phenomenon through the use of interviews, observational field notes and researcher reflections. Preliminary data collected from the Principal and Inclusion Survey (Praisner, 2003) was used to corroborate the qualitative data.

Instrumentation Validation

A pilot case study involving one school principal at a large, private school in suburban London, England was conducted over the course of six weeks in May and June, 2009. The researcher was participating in an international research project and had an opportunity to collect data from a reputable inclusion leader. The purpose of this pilot study was to validate the appropriateness of the research instruments and the research procedures for this current study.

The pilot study commenced with the participant first completing a modified version of the Principal and Inclusion Survey (Praisner, 2003). The participant was then observed on a daily basis at the school site, and while administrating a professional development meeting with the entire school staff. Observational field notes were taken and the principal was interviewed for over an hour and a half using this current study's observational field note template and interview protocols (modified for a British Educational context).

Based on the pilot study, the researcher concluded that the interview protocol was suitable to collect qualitative data for the current study. Through the interview process, the single participant assiduously shed light on his inclusive practices and on his role as the leader of inclusion in his school's professional learning community. The pilot study also affirmed that a regional specific survey (i.e., modified Principal and Inclusion Survey) was most suitable for collecting data in the Ontario context. The local nomenclature with regard to special education terminology and legislation was made community specific for this current study.

To further validate the research instruments (interview protocol; survey), the advice of expert practitioners was sought. Feedback on the study's research instruments was provided by four former elementary school principals (equally representative of the Ontario public and the publicly funded Catholic system and also equally representative by gender) as well as a former supervisory officer of education responsible for special education for a large urban school district. The validators were asked to assess the instruments based on their first impressions, the ease of use, question appropriateness with respect to the role of an elementary school administrator, the redundancy of the questions, and to report any missing question prompts or queries. The validators were provided with a letter outlining their task with a matrix to present their feedback (see Appendix A).

The validators offered suggestions and feedback that was critical for clarifying and revising the finalized questions for the interview protocols. Based upon this collective feedback, it was clear that the instruments covered many aspects of the role of the principal who fosters an inclusive environment.

The validation group also collectively agreed that Praisner's survey needed to be modified to the Ontario context to include Canadian and Ontario specific terms on labeling disability categories. Consequently, the researcher modified Section II and Section IV of Praisner's original Principal and Inclusion Survey for this current study by incorporating the Ontario Ministry of Education's approved list of exceptionalities in place of Praisner's disability categories to be sensitive to the Ontario context. The researcher also included the category of "giftedness" which was absent in the original survey. The validators felt that including giftedness may yield interesting discussions on

the topic of inclusiveness in the school community. The giftedness category is also one of the 12 exceptionalities defined in the *Education Act* (1990).

Instrumentation

To validate the accuracy of this qualitative study's findings, triangulation was used to corroborate evidence obtained from multiple sources of information, individuals and processes (Creswell, 2008). In addition to a multi-participant sample, the researcher utilized multiple qualitative research instruments to ensure that the study was adequately triangulated to produce credible findings (Gay, Mills, & Airasian, 2012). The following section describes each instrument utilized in the data collection process.

Interviews

Interviews are purposeful interactions which allow an individual to gain information from another (Gay et al., 2012). In this qualitative study, each participant was interviewed twice (between October 2010 and June 2011) in a one-to-one setting over the course of the research. The interviews lasted approximately one hour and were conducted in the privacy of the principals' personal offices. The researcher used two interview protocols composed of open-ended questions (see Appendices B & C) which allowed the participants to describe their experiences and perspectives (Creswell, 1998; Gay et al., 2012). In a structured interview, the researcher may ask follow-up questions for clarity purposes or to inquire about a topic that might have come up unexpectedly in conversation (Gay et al., 2012). Creswell (1998) notes, "I am reminded how a good interviewer is a listener rather than a speaker during an interviewer" (p. 125). Keeping this in mind, the researcher facilitated a discussion using a structured protocol which allowed the participant to share their past and current experiences and philosophies.

The researcher began the interviews with icebreaker questions to build rapport with the participants (Gay et al., 2012). Gay et al. (2012) state: "A researcher must always take the time to enter the research setting unobtrusively and build support and trust…a trusting relationship is essential if participants are to answer questions—particularly about sensitive issues – with candor" (p. 387). These initial questions also provided the opportunity to record essential information about the participants' background as teachers and as administrators, as well as their description of their current school site including student population, demographics, and staff. Following these introductory questions, the interview focused on open-ended questions regarding the participants' personal philosophy of inclusion and their role as an elementary school principal as a leader of inclusion (Creswell, 1998; Gay et al., 2012). The questions addressed issues from the current educational inclusion climate both in practice and in the literature. Interviews were audio-recorded, which Creswell (1998) considers: "an essential necessity, I believe, in accurately recording information" (p. 124). Subsequently, the interviews were transcribed by the researcher and then were sent back to each participant for member checking.

Observations

A field-note observation template was used when observing each of the principals as they facilitated staff meetings (see Appendix D). General information regarding the staff meeting setting, date and time, the location, and the duration of the observation was recorded for each meeting observation. Descriptive and reflective notes were taken in point-form notation. The researcher recorded these notes onto the field-note template during each principal-facilitated staff meeting. Descriptive notes focused on issues related to education and including students with exceptionalities that the principal

participant discussed during the staff meetings. Reflective notes were taken regarding the researcher's personal reactions while observing the meetings.

The members present at the staff meeting were made aware of the researcher's role during the meeting. The participant informed the staff that the researcher was an unobtrusive observer during the meetings and was focused on observing the process of the participant facilitating the meeting with other teachers. Specific information about individual students that were discussed at the meetings was not documented in the field notes.

The researcher also documented descriptive and reflective notes immediately following all observations with participants which were privately audio-recorded. These audio-recorded reflective field notes were transcribed and coded for analysis.

Principal and Inclusion Survey

Data were also collected through surveying the four principal participants. The researcher used a modified version of Praisner's (2003) Principal and Inclusion Survey to capture preliminary data with respect to the attitudes toward inclusion that the elementary school principals held (see Appendix E). The original survey was modified to include Ontario-specific terminology with regard to the Ministry of Education approved list of exceptionalities. Permission was granted by the author of the Principal and Inclusion Survey for the use in this study.

According to Praisner (2003), the purpose of the survey is to determine the opinions of elementary school principals towards the inclusive education philosophy and to document information with regard to the principals' training and experiences. The Principal and Inclusion Survey has been employed by numerous researchers in the field

investigating principals and their philosophy of inclusion. The survey is four pages in

length and contains four sections. Refer to Appendix I for a detailed account of the

Principal and Inclusion Survey. In chapter 4, links will be made between the Principal

and Inclusion Survey data and the qualitative data for each participant.

Selection of Site and Participants

Four participants from three southern Ontario school boards participated in this

study. The researcher opted for three school boards to participate to increase the potential

pool of participants as well as to allow for an investigation into the similarities and

differences of inclusive programming and delivery between the participating school

boards.

After receiving research ethics board clearance from each school board, the

supervisory officers responsible for special education from each school board were asked

to offer a list of names of the elementary school principals who excel as leaders of

inclusion. The participants were selected from a purposeful sample from these lists by the

researcher. The researcher forwarded each potential participant a Letter of Invitation to

participate in the study and as well as an Informed Consent. There were two participants

selected from one of the school boards. The final sample for this study was finalized

when four administrators from the three school boards responded with their intent to

participate after each receiving the Letter of Invitation and the Informed Consent.

Description of Participants

This study involved a purposeful sample of four elementary school (JK-Grade 8)

administrators from three publically funded school boards in southern Ontario. One of the

participants was from a public school board and remaining three participants were from

publicly funded Catholic school boards. All four participants have been assigned

pseudonyms. A detailed account of each participant will be presented in Chapter 4.

Data Collection

After securing the four administrators for the study, each participant was

forwarded the Principal and Inclusion Survey as well as the first interview protocol in

preparation for their interview appointment. An interview time was established and a

time frame for completion of the survey which would be collected at the first interview.

The participants returned the completed survey to the researcher in a sealed envelope

when they met for the first interview.

The four participants were interviewed twice in their private office between

October 2010 and June 2011 for approximately 60 minutes in duration. The interviews

were audio-recorded and transcribed by the researcher. The typed transcriptions were

made available to each participant by email to be member checked for accuracy and to be

approved for use in data analysis. After completing the first interview, the researcher and

participant scheduled the first observation and the second interview.

The four participants were observed on three occasions between October 2010

and June 2011 while they facilitated staff meetings with Special Education Resource

Teachers (SERTs) and support staff. The researcher acted as an unobtrusive observer

during these meetings and did not interact with the other parties. Prior to observing each

staff meeting, the participant explained to their members of the staff that the purpose of

the researcher's observations was to observe the meeting as part of a graduate studies

research project and that the researcher will take open-ended field notes (see Appendix

D) with regard to the principal's actions only. The researcher requested that each

participant read a script prior to the commencement of the meeting:

> I am participating in a research study called, "Elementary School Principals as
>
> Leaders of Inclusion for Students With Exceptionalities." As a form of data
>
> collection, the graduate student doing this research wishes to observe me
>
> facilitating meetings with Special Education staff or teachers. He will be an
>
> unobtrusive observer during these meetings and not interact with you. He will
>
> take open-ended field notes with respect to my actions. If you object to his
>
> presence, please express your objection now before I invite him into the meeting.

Consent from each member present at the meeting was obtained before observing. This

process was repeated for all three meetings observed for each participating principal in

the study. The observation periods did not exceed 60 minutes in duration. The

participants chose which meetings that the researcher sat in on. In addition to recording

descriptive and reflective notes using the observation template, the researcher also audio

recorded descriptive and reflective comments (post-observation and in a private location).

These comments were then transcribed, analyzed and coded by the researcher. See

Appendix H for the data collection schedule for each participant.

Data Analysis

Thematic qualitative analysis (constant comparative method; Creswell, 2008) of the data

was used to find common themes in the interview responses and reflective field notes

(descriptive and reflective notes from the observation template as well as researcher

audio-recorded reflections).

Prior to beginning the data analysis process, the participant's interviews were transcribed and member checked for authenticity and approved for use in data analysis. Each participant received a hard copy of their interview transcript from both interviews to be validated. Each participant informed the researcher by telephone or by email, that they approved of the transcription and that the representations documented their perspective accurately. Sam requested for minor omissions from the original transcript to remove additional phrases that she felt to be identifiers to her school community. The omissions were made and they were approved by Sam for accuracy. Paul, Claire and Neil approved their transcripts as is.

After the participants validated their transcripts for use in data analysis, the first step for data analysis was a preliminary read of all of the data. This was done to gain an initial sense of the data, as Krathwohl (1998) notes, "the first time you sit down to read your data is the only time you come to that particular set fresh" (p. 309). During this preliminary and subsequent readings, the researcher recorded memos in the margins beginning the search for recurring themes or common threads (Gay et al., 2012).

Subsequently, the researcher began to separate the participant data into common categories of reoccurring concepts by breaking down the collection of data into smaller parts through the process of coding. Coding, or classifying, "determin[es] their import and putting the pertinent units together in a more general, analytical form" (Gay et al., 2012, p. 468). The researcher began to highlight the qualitative data to classify parts into categories. The researcher referenced written memos and used a rough draft of a matrix to begin to categorize data into common groupings. Gay et al. (2012) note that "a category is a classification of ideas or concepts; categorization, then, is a grouping the

data into themes" (p. 468). After the initial rounds of coding, 18 categories surfaced from the data. These original categories included: "Administrative styles (Philosophy) within schools," "Roles," "Trust: delegating duties vs. leading," "Meeting conduct and process," "Overcoming obstacles and conflicts with parents," "Advocating for financial, educational, and human resources," "Leader and participants within an inclusive PLC," "Encouraging staff," "Coaching staff/Professional learning," "Collaborating assessment and instruction discussions," "Principal's personal growth as professionals," "Defining inclusive environments," "Examples of inclusion (staff & students)," "Principals' experiences with inclusion," "Experiences of students who do not have exceptionalities," "Humanistic qualities," "Investment, commitment, and empathy," and "Personal experiences with inclusion (family, friends)." These categories were examined for similarities, differences, as well as for possible connections. Next, these initial categories were clustered into five common units of meanings, known as themes.

Prior to reviewing the data again, the researcher organized the list of the potential five themes and subcategories into a chart to assist in the organization of the analysis of the qualitative data. The next analysis consisted of the researcher using this chart and read over the qualitative data again, this time clustering the data into the five themes using different colour highlighters. Each passage was highlighted an appropriate colour to associate it with its suitable theme. Afterwards, all of the individual passages from all of the qualitative data were grouped together into the five appropriate themes. The passages were then grouped together into common subcategories. Gay et al. (2012) suggests that "as you analyze and code, you reduce your data to a manageable form" (p. 469). Through the act of coding, the researcher was able to condense each passage (quotation, field note

description, researcher reflection) into a common unit of meaning, or theme, which allowed the researcher to make sense of the data. Over the course of this process, new subcategories emerged, some subcategories were further developed, while others were merged together or purged.

Following this sequence of analysis, the researcher developed a multifaceted matrix to synthesize the data. The researcher utilized the matrix to ensure that there was an equivalent distribution of passages in each theme and subcategory from each participant and method of data collection (interview transcript, observational field note, researcher reflection). The matrix tallied the number of passages for each participant and referenced these passages from the source of data from which they were obtained (interview transcript, observational field note, or researcher reflection transcript) as well as which theme that they were being classified. The matrix showcased a comparatively equivalent distribution of data in terms of responses generated for each of the five themes, from all rounds of data collection, and representing each participant. The matrix was updated following the writing of the draft of Chapter 4 to ensure that there was still consistency among the data.

In an effort to analyze the data in an accurate and reliable way, the researcher sought insight from his thesis supervisor, who acted as a critical associate, to assist with the coding and collapsing of the codes into themes. This consultation occurred at each stage in the data analysis process. The researcher first validated his original list of themes which were then used to code the data into common groupings. Next, he validated each theme's cluster of passages (all highlighted data from all sources of qualitative data). After consultations at this stage, a few passages were ultimately merged with other

subcategories or even themes other where necessary. Finally, the researcher debriefed his thesis supervisor of the synthesis of the data analysis process utilizing the matrix which showcased an equivalent distribution of data among participant, theme and source of qualitative data.

After the data analysis process, the qualitative data was clustered into five themes which originated from the data: (1) Leading an Inclusive School: Managerial Duties and Leadership Style; (2) Inclusive Collaborative Cultures: Leading and Participating in an Inclusive PLC; (3) Inclusionary Cost Analysis: Securing Board Funding and Allocating Resources in an Inclusive School; (4) Defining Inclusive Environments and; (5) Humanistic Qualities of Effective Inclusive Leaders. These five themes signify the reoccurring conceptual categories expressed in the principal participants' responses which were corroborated by the researchers' descriptive and reflective notes and verbatim transcripts.

Data from the Principal and Inclusion Survey results were used to support and offer explanations for qualitative findings. The themes are presented in the form of a narrative (Creswell, 2008). In Chapter 4, the four participants' perspectives and experiences are documented in narrative form as a function of the study's findings. There is a discussion and presentation of implications of these findings in Chapter 5.

Methodological Assumptions

This research assumed that the data collected from October 2010 and June 2011 truthfully represents the administrators' philosophies and practices. These depictions were drawn from the entire data collection process and represent the administrators' views and experiences from this period and the context of their vocations.

It is also assumed that the information provided by the participants is both truthful and accurate to the best of the participants' recollection. The Principal and Inclusion Survey asked closed-ended questions while the two interview protocols encouraged open-ended responses. The researcher validated the participants' responses by triangulating the results of the survey, interviews, and observations of the three principal-facilitated staff meetings.

Lastly, it is also assumed that the lists of potential participants provided by the superintendent responsible for special education for each participating school board was truthful in nominating exemplary leaders of inclusion from each of their respective school boards. The supervisory officers responsible for special education from each school board were asked to offer a list of names of the elementary school principals who excel as leaders of inclusion. These lists, which were regarded as accurate by the researcher based on the superintendent's nomination, were used to select the sample for this study.

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Limitations

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This qualitative study has some limitations. First, the sample size for this study was limited to four administrators from Southern Ontario. The four administrators who participated in this study were from three different school boards. Claire was a principal of an inner-city school. Paul and Sam's schools (within the same school board) were located in a residential neighbourhood of a large urban city. Neil's school was located in the suburbs of a medium-sized city. If time had provided, it would have been beneficial to have had a larger sample of participants.

A second limitation is that this study represents only a snapshot of the four participants' experiences and practices. The researcher recognizes that it would have been

advantageous to have had the opportunity to collect data over a longer duration of time. A longitudinal study, for instance, would allow for research into the current phenomenon over an academic school year. Multiple observations and interviews over this duration would have produced results with greater depth and could have impacted the results when compared to this current study.

Thirdly, it is important to note that the findings of this research are not to be generalized. The four administrators who comprise the sample of this study were nominated by their superintendents responsible for special education, based upon their reputations of being exemplary leaders of inclusion in their individual school boards. Although, one cannot generalize that these strategies will be transferable from one school or board to another, they can inform other administrators of strategies or best practices that may be applied to their school communities.

Lastly, there is a limitation with respect to the researcher's familiarity with each participant's school culture. The researcher is not a part of the individual school cultures in which he is researching and therefore only has a limited perspective coming only from the administrator at their respective schools, as well as from observations made during meetings with staff and walk-abouts through the school in the company of the administrator. Time was also a factor with regard to the researcher's familiarity with each participant's school culture.

Researcher Bias

As a researcher, I am compelled by an interest in the intersection between inclusive education and educational administration. I firmly believe that principals are pivotal for providing inclusive learning environments for students with disabilities. I am eager to document how effective leaders of inclusion create and maintain an inclusive

learning environment and how they promote inclusiveness within their respective

school's professional learning community.

I also acknowledge that the data collection and analyses were framed by my own

personal perspective, biases, and past experiences. As previously mentioned, the study

has been framed through social constructivist and humanist theoretical orientations.

Subscribing to these paradigms myself, I recognize that as a researcher I may have been

predisposed to recognize these practices during site observations or when conducting

interviews. Accordingly, the instrumentation, data collection, and analysis processes

reflect these orientations.

Establishing Credibility

A variety of strategies were exercised to establish credibility when collecting and

analyzing these qualitative data. Participants in qualitative studies are often asked by

researchers to validate the accuracy of their personal narratives as documented (Stake,

1995). This process is called member checking. After both rounds of interviews, the data

were transcribed, coded and analyzed by the researcher, and sent back to each participant to

be validated through the process of member checking. In this study, each participating

elementary school principal received a hard copy of his/her interview transcriptions in

order to corroborate the researcher's transcription of the interviews.

After reviewing their personal interview transcriptions, the participants were in

agreement that amendments were not necessary and there was a shared consensus that the

representations documented their perspectives accurately. It is noteworthy to include that

one of the four participants, Sam, requested for minor omissions from the original

transcript to remove additional phrases that she felt would be identifiers of her school

community. These omissions were made and they were approved by Sam for accuracy. Paul, Claire, and Neil approved their transcriptions as is.

Ethical Considerations

In keeping with the conventions of a qualitative research design, it was essential to adhere to the highest ethical standards when working with human participants (Yin, 2009). Prior to engaging in the data collection process, the researcher sought ethical clearance approval to conduct research within the research sites described. The Brock University Research Ethics Board and each of the participating school boards' research advisory councils granted ethical clearance for this study. The study was identified by Brock University's Research Ethics Board as study #08-311. The following individual practices were exercised to guarantee the rights of the participants.

All participants provided their consent by signing the Informed Consent form and understood what was expected for their participation in the study. Participant consent was also attained at each interval stage in data collection and the researcher reminded the participants that their participation in the study was voluntary. To protect the rights of the participants, as well as to foster a relationship based on trust which would encourage openness when participating, confidentiality guidelines were practiced for the duration of the study. Each participant was assured that the information he/she provided would be kept confidential and that his/her name would not appear in any report resulting from this study. All participants were provided with feedback on the findings of this research by email in July, 2013.

Restatement of the Area of Study

The purpose of this study was to gain an in-depth perspective into the experiences of elementary school principals who are leaders of inclusion within their schools' professional learning communities. Examining the particularity and complexity of a case allowed the researcher to gain understanding of the important circumstances incurred as a function of the principal role while creating and maintaining an inclusive learning environment for students with exceptionalities in their schools. Since administrators set the tone and direction of their school, it is fundamental that the administrator encourages and supports all members of the professional learning community to facilitate inclusion for all students. The administrator can ensure inclusion is ubiquitous within the school only if all members of the learning community are committed to this premise. There must be a cohesive relationship and team approach among all school staff in order to meet the inclusion needs of all students with exceptionalities. Thus, it is timely to identify and document the practices of exemplary elementary school principals who are leaders of inclusion.

Four elementary school principals from three southern Ontario school boards participated in this study. These participants were recognized for excelling in their roles as leaders of inclusion within their schools' professional learning communities. The practices and attitudes of these principal participants were documented.

The purpose of this qualitative study was threefold: to examine the experiences and characteristics of these elementary school administrators as they attempt to establish and maintain inclusive learning environments and how they endeavor to create one; to study what principals encounter as they facilitate their role as inclusion leaders in their

schools' professional learning communities; and lastly, to investigate how elementary school administrators delegate duties with respect to creating and maintaining an inclusive learning environment for all students with exceptionalities. Triangulation of the qualitative data was achieved through two participant interviews, multiple observations of the elementary school principal participants facilitating special education and inclusion themed staff meetings, and the quantitative survey data from the completion of an Ontario context modified Principal and Inclusion Survey. The information gained from these data collection processes was coded to reveal emerging themes that answered the research questions. The following chapter discusses these themes.

CHAPTER FOUR: PRESENTATION OF RESULTS

This study examined the experiences of elementary school principals who are leaders of inclusion in PLCs. The researcher used a qualitative research design methodology to study four elementary school principals from three southern Ontario school boards to identify and document attributes and roles of principals who create and maintain inclusive learning environments for students with exceptionalities. Preliminary data were also collected from the Principals and Inclusion Survey (Praisner, 2003) to corroborate the qualitative data.

The study's purpose is threefold; it identifies (a) characteristics of elementary school principals who created inclusive learning environments for students with exceptionalities; (b) strategies principals use to elicit the commitment and participation of members of PLCs to maintain such environments; and (c) challenges principals encounter as inclusion leaders in their schools.

The following section presents results from the Principal and Inclusion survey and discusses the study's five themes. The survey results highlight the participants' attitudes, actions, and personal reflections as inclusive leaders. Data from the survey help explain and support the study's qualitative findings.

Principal and Inclusion Survey Results

Quantitative data were collected by surveying the four principal participants using the Principal and Inclusion Survey (see Appendix E). The survey sought to identify the elementary school principals' opinions of inclusive education and document their training and experiences. (Responses for Sections III and IV are shown in Appendices F and G).

Paul

Paul was in his 40s and has been principal of his current school since 2006. He spent 15 years as a classroom teacher in all of the elementary school divisions (primary, junior, and intermediate) before pursuing administration. During his 3 years as vice-principal, Paul still had teaching responsibilities on a half time basis.

Paul has taken no Additional Qualifications (AQ) courses in special education but has attended approximately 24 in-service workshops over the past 10 years on topics such as: characteristics of students with disabilities, academic programming for students with disabilities, supporting and training teachers to handle inclusion, eliciting parent and community support for inclusion, and fostering teacher collaboration. His school has a plan in place to deal with crises involving students with exceptionalities and his board's mission statement includes a vision for students with disabilities. Paul has experience with an individual with a disability (an immediate family member) outside the school setting.

Paul's school, which was located in a residential neighbourhood of a large urban city, had approximately 450 students (avg. 20-24 students per class), 28 teaching staff, and 15 educational assistants. More than 21% of students had IEPs, approximately 81%-100% of whom were included in regular education classrooms for at least 75% of their school day. Paul's board delivers special education programming in a full-inclusive model.

The survey revealed Paul's positive experiences for all categories of exceptionalities in the school setting. In the Attitudes Toward Inclusion of Students with Special Needs (hereafter referred to as "Attitudes") section, he strongly agreed that educators can do much to assist students with disabilities and that regular education

should meet the needs of all students, including those with disabilities. He agreed that students with severe disabilities and those without disabilities enhance learning experiences of those with disabilities. He disagreed that only teachers with special education experience could deal with students with disabilities, and that no discretionary financial resources should be allocated for the integration of students with disabilities. He strongly disagreed that students with disabilities are too impaired to benefit from regular school activities or should be placed in special classes/schools, and that it is unfair to ask regular teachers to teach students with disabilities.

In the Most Appropriate Placements for Students with Disabilities (hereafter referred to as "Placements") section, Paul indicated that full-time regular education with support is appropriate for students in all disability categories except for those with physical disabilities, whom he believes should have regular classroom instruction for most of the day.

Claire

Claire was in her 50s, has worked in education for 36 years for the same public school board (starting as a classroom teacher in 1975), and has taught Grades 1-8 and secondary school geography. She later began two consecutive consultantships for her board and became a vice-principal for 3 years until her promotion to principal in 1995. She has 15 years' experience as a principal including the past 4 years at her current school. She facilitated the amalgamation of two schools and supervised construction of an elementary school, introducing design suggestions and her vision for the school during the planning process.

Claire has taken Special Education Part 1 and approximately eight in-service

workshops over the past 10 years on topics such as: characteristics of students with disabilities, academic programming for students with disabilities, supporting and training teachers to handle inclusion, and field-based inclusion activities. Her school has a plan in place to deal with crises involving students with exceptionalities, but her board's mission statement does not include a vision for students with disabilities. Claire has experience with an individual with a disability (a friend) outside the school setting.

Claire's elementary school was located in an inner-city neighbourhood and had approximately 500 students (avg. 20-24 students per class). More than 21% of students had IEPs, of whom 41%-60% were included in regular education classes for at least 75% of the school day. Claire's school offers two specialized programs for students with exceptionalities, including intensive autism and speech and language programs.

Like Paul, Claire indicated she had positive experiences with all categories of exceptionalities. In the Attitudes section, she strongly agreed that: (a) students with severe and profound disabilities and those without disabilities enhance learning experiences of those with disabilities; (b) effective regular classroom educators can do much to assist students with a disabilities; (c) students without disabilities can benefit from contact with students with disabilities; and (d) regular education should be adapted to meet the needs of all students, including those with disabilities. She disagreed that it is unfair to ask or expect regular teachers to teach students with disabilities. She strongly disagreed that: (a) only teachers with extensive special education experience can be expected to deal with students with disabilities; (b) students with disabilities are too impaired to benefit from regular school activities; (c) students with disabilities should be placed in special classes/schools; and (d) no discretionary financial resources should be

allocated for the integration of students with disabilities. Claire placed a question mark after the statement "It should be policy and or law that students with disabilities are integrated into regular education programs and activities," indicating that she was reflecting on the statement.

Claire did not complete the Placements section, expressing that "the range [of choices] is too broad." She believes that the appropriate placement "depends on the severity" but that all students should at least have minimal integration. She also indicated that she believes a special education class for most or all of the school day is the most appropriate placement for students with multiple exceptionalities.

Sam

Sam is an elementary school principal in the same school board as Paul. Sam was in her 40s and principal of her current school for the past 5 years. Before becoming a principal, Sam was a classroom teacher for 12 years and taught in primary, junior, and intermediate divisions. She was a numeracy consultant for 3 years before her 1-year tenure as a vice-principal and subsequent principalship.

Sam has taken no AQ courses in special education but has participated in more than 25 in-service workshops over the past 10 years on topics such as: characteristics of students with disabilities, behaviour management class for working with students with disabilities, academic programming for students with disabilities, and supporting and training teachers to handle inclusion. Sam recently obtained her supervisory officer qualifications and will seek accreditation as a special education specialist to pursue a position as a superintendent. Her school has a plan in place to deal with crises involving students with exceptionalities. Sam and Paul's board's mission statement includes a

vision for students with disabilities. Sam has personal experience with an individual with a disability (an immediate family member) outside the school setting.

Sam's school, which was located in a residential neighbourhood of a large urban city, had approximately 480 students (avg. 25-29 students per class), 25 teaching staff, and 12 educational assistants. Approximately 11%-15% of students have IEPs, all of whom are included in regular education classrooms for at least 75% of their school day. Sam and Paul's school board delivers special education programming in a full-inclusive model.

The survey revealed that Sam has had positive experiences for all categories of exceptionalities. In the Attitudes section, she strongly agreed that: (a) students with severe and profound disabilities and those without disabilities enhance the learning experiences of those with disabilities; (b) effective regular classroom educators can do much to assist students with disabilities; (c) students without disabilities benefit from contact with those with disabilities; and (d) regular education should be adapted to meet the needs of all students, including those with disabilities. She strongly disagreed that: (a) only teachers with extensive special education experience can be expected to deal with students with disabilities; (b) students with disabilities are too impaired to benefit from regular school activities; (c) students with disabilities should be placed in special classes/schools; (d) it is unfair to ask or expect regular teachers to teach students with disabilities (but added that teachers do require "supports"); and (e) no discretionary financial resources should be allocated for the integration of students with disabilities. Interestingly, she indicated that she was uncertain if policy and/or law should require students with disabilities to be integrated into regular education programs and activities.

In the Placements section, Sam indicated she believes full-time regular education with support is the most appropriate placement for students in all disability categories.

Neil

Neil was in his late 30s and has been a principal for 7 years (the past 3 at his current school). Neil had been a classroom teacher for 6 years (Grades 5 and 7) and a vice-principal for 2 years (during which time he taught junior kindergarten on a half time basis). Neil continued classroom teaching in his first year as a principal, providing coverage for teachers and French language instruction. Neil is the elementary principal representative on his board's Special Education Advisory Committee.

Neil was the only participant who was a specialist in special education. He has participated in approximately 16 in-service workshops over the past 10 years on topics such as: characteristics of students with disabilities, behaviour management class for working with students with disabilities, and academic programming for students with disabilities. Neil's school has a specific plan in place to deal with crises involving students with exceptionalities. His board's mission statement has a vision for students with disabilities. He has personal experience with an individual with a disability (an immediate family member) outside the school setting.

Neil's school, which was located in the suburbs of medium-sized city, had approximately 400 students (avg. 20-24 students per class), 25 teaching staff, and five educational assistants. Approximately 11%-15% of students have IEPs, of whom 80%-100% are included in regular education classrooms for at least 75% of the school day. Neil's board delivers special education programming in a full-inclusive model.

The survey revealed that Neil had positive experiences for all categories of exceptionalities; however, he had no experience working with students with blind and low vision. In the Attitudes section, he strongly agreed that: (a) schools with students with severe and profound disabilities and those without disabilities enhance the learning experiences of those with disabilities; (b) effective regular classroom educators can do much to assist students with disabilities; (c) students without disabilities benefit from contact with students with disabilities; (d) regular education should be adapted to meet the needs of all students, including those with disabilities; and (e) it should be mandated that students with disabilities are integrated into regular school activities. He strongly disagreed that: (a) only teachers with extensive special education experience can be expected to deal with students with disabilities in a school setting; (b) students with disabilities are too impaired to benefit from regular school activities; (c) students with disabilities should be placed in special classes/schools; (d) it is unfair to ask or expect regular teachers to teach students with disabilities; and (e) no discretionary financial resources should be allocated for the integration of students with disabilities.

Like Sam, Neil indicated in the Placements section that full-time regular education with support is the most appropriate placement for all students regardless of their exceptionality.

Results for Section III of the survey showed participants all had positive attitudes towards inclusive education. Section IV documented each participant's choice for most appropriate placement for students in Ontario's 12 designated exceptionality groups; Paul, Sam, and Neil indicated "full-time regular education with support" was the best

option for all students, while Claire felt it "depends on severity…minimal integration at least." An exception in Section IV results was Paul and Claire's response regarding students with physical disabilities: Paul felt the most appropriate placement was regular classroom instruction for most of the day, while Claire thought such students would be best educated in a special class for most of the day; Sam and Neil recommended full-time regular education with support. The aforementioned results are expanded upon in the qualitative findings presented below.

Thematic Analysis

The analysis of qualitative data uncovered five themes. Theme 1, "Managerial Duties and Leadership Style," reveals administrative processes that principals use to promote inclusion as leaders in elementary schools. Theme 2, "Inclusive Collaborative Cultures," shows how participants create, maintain, and participate in their schools' PLCs. Theme 3, "Inclusionary Cost Analysis," pertains to how principals acquire and distribute funds to deliver inclusive programs. Theme 4, "Defining Inclusive Environments," examines participants' understanding of inclusion. Lastly, theme 5, "Humanistic Qualities of Effective Inclusive Leaders," shows how participants exemplify leaders of inclusion. The five themes are presented in the form of a narrative.

Theme 1: Managerial Duties and Leadership Style

The first theme corresponds to managerial duties and leadership styles best suited for inclusive education. Participants discussed (a) their role in providing inclusive education for students with exceptionalities; (b) the use of differentiated instruction; (c) how they manage inclusive schools; (d) the role of the SERT; and (e) communication with parents who resist inclusion.

Role of inclusion leaders. The four principals elaborated on their personal roles as leaders of inclusion in their school's PLCs. Although they each offered unique personal opinions about their roles as elementary school principals, they unanimously noted that their mission is to advocate for inclusion through communication with staff and students' families.

In his interview, Paul indicated that his role is to act as a resource "along with the special education teacher" for all stakeholders; "an individual who tries to get the students further help" and "reassure the parents that we have the child's best interest at heart ... and that we're on a journey together but at least things are available to the student in an environment of Catholicity." Paul also helps his teaching staff deliver inclusive programming and advocates for students with exceptionalities by collaborating with their parents on a shared "journey."

Likewise, Sam expressed in an interview that leading an inclusive school encompasses all that she does, that it is "just part of who I am" and "not something I really think about." She also points out that inclusive leadership extends beyond the classroom or office: "You have to have time management and you have to be out there. I don't sit in my office; I'm out there on the field. The kids see me when I'm walking by a student, high fiving. I [validate] those children with disabilities. I will give them importance." Claire also argues that leaders "have to balance curriculum, inclusion, equity—and equity is not always equality."

Likewise, Neil advocates for inclusion by seeking to transform the way educators and parents understand education with respect to inclusion and differentiated instruction. He explained during an interview that he envisions his role as "a champion of choice"

who wants to "impress upon people the true need to change the way that we do business to provide students with an opportunity to show us what they can learn." Neil adds that because students can demonstrate their learning in various ways, educators should be "less regimented and much more open to variety in a class."

Claire's perceived role as a "champion" for inclusion extended beyond Neil's advocacy for students and encompassed praise and support for her staff's professional needs. She noted in an interview that she sought to "bring the best out in everybody. ...To shine a light on their best qualities and quietly support them in growing in those areas that they need a bit of support in," such as inclusive classroom programming.

Use of differentiated instruction. The four participants also noted they communicate to their teaching staff how inclusive education can be developed through the use of differentiated instruction. Paul, for instance, references the Ministry of Education's (2005) *Education for All* as he explains to teaching staff that "Differentiated instruction...is indeed a big push to help all learners succeed." Likewise, Sam stated, "It's not an option. We have to differentiate instruction all the time." Like Paul, Sam stated that differentiation is an expectation of all staff.

Neil agreed with this position and expects teachers to not only identify students at risk but to then put a plan into action to meet their learning needs. He also points out that the Ontario Ministry of Education's (2010) *Growing Success* encourages teachers to reflect upon their practice to ensure that differentiated instruction is taking place:

> *Growing Success* is an expectation in terms of reporting and evaluating. ... If you
> are going to evaluate a certain way then you need to be setting up... your program
> in a specific way... [to understand]... where your students are at and what you are

going to do to get them to that next level. And what you are going to do to assess

to ensure there have been any gains made with that student.

Claire shares Neil's expectations and poses similar questions to her teaching staff: "The

two questions to every teacher that should be front of their mind [are]: Who's at risk in

your class and what are you doing to meet their needs?" In short, all participants said they

try to ensure their expectations for inclusion are embraced and delivered by their teaching

faculty. Next, the administrators discussed how they ensure that inclusion is taking place.

Managing inclusive schools. The participants discussed their managerial

practices that foster and maintain inclusion in their schools. For instance, Paul noted that

he dialogues with his staff to

make sure as an administrator that I affirm [to my teachers to] please refer to the

[Individual Education Plans], look and check through the [Ontario Student

Records], check through any documentation to make sure that you're

programming appropriately for the student.

Likewise, Claire shared that individual class and school profiles are discussed

during "Student Update Meetings" to ensure her teachers are meeting all students' needs.

She also makes an effort to be visible to her staff and students by moving to a common

work space, such as the pod areas in her school, which allows her to observe while she is

doing her paper work and "to dialogue with the kids and teachers." Claire added that her

staff greatly appreciate "that we're visible and accessible. And they feel comfortable

talking with us about the issues so we can move forward." Claire's visibility and

accessibility was confirmed by researcher reflective notes describing her practices during

a walk-about: "I noticed that when Claire went into classrooms…it is nothing out of the

ordinary. The students continued to learn (without being distracted from our visit) so this

... must be a regular practice."

Lastly, Neil expressed that administrators must ensure that all students receive the

best education: "I think the greatest responsibility that we have is not to accept

mediocrity. ... In all sincerity, I think our responsibility as educators is really to own up to

what our duties are as a teacher in the *Education Act* (1990)." He explained his approach

when educators are not meeting his expectations:

> You just sit them down and let them listen to the music. ... Show them, maybe not
>
> what they've been missing, but ... what you are expecting them to do. ... They
>
> need to hear it, they need to read about it, they need to experience it. Also, just to
>
> let them know that there is a belief that you can all do it, we can all do this, this is
>
> not new. It's a different approach to teaching; maybe it's a philosophically
>
> different approach to what many had been used to.

In other words, Neil works with his staff to let them know that pedagogical practices

such as differentiated instruction are an expectation; when staff does not follow

through, he works with them one-on-one to identify the expectations and then coaches

them to change their practice.

Role of the SERT: Inclusion leaders' "left arm." The principals also

emphasized how special education resource teachers (SERTs) help facilitate inclusion.

The principals indicated that SERTs are resources for all staff members who support,

assess, and diagnose students, and are often responsible for drafting and filing legal

documents such as IEPs. The participants affirmed that SERTs are trusted members of

the staff and are recognized as being accountable with a heightened authority and responsibility. For example, Paul described how a particular SERT

> updates all the IEPs, ... plans the IPRC (Identification, Placement and Review Committee) review meetings, psychological review meetings, [and] weekly SRT [School Resource Team] meetings. She facilitates and contacts board personnel to come in for various meetings. We meet almost on a daily basis to discuss student situations, student issues that may arise because of our high needs. She is a valuable resource because of...all [of] her professional knowledge and because of her working knowledge of ... the documentation and of ministry policy. ...She helps organize and orchestrate many things throughout the day.

The researcher's reflective notes confirm that Paul values his SERT's responsibilities:

> There is a level or respect and authority given to the SERT…Paul had to be excused from the meeting and the meeting carried on just as normal. [When he returned] he did not need to be updated with regard to what was discussed [in his absence].

> Claire agreed that SERTs "definitely [have] a leadership administrative role" within the school and noted that she is working to free up her SERTs' schedules to allow them more time to work with students with exceptionalities in a small-group environment. Similarly, Sam confided that her SERT is as valued as her vice principal (she referred to her SERT as her "left arm" and her vice principal as her "right arm") and highlighted the SERT's important role: "She is key in scheduling, in monitoring EAs, in monitoring that program delivery is happening, that each child is getting the optimal resources and supports. She's key in running our weekly special education meetings."

The researcher's reflective notes confirmed the SERT's key role and Sam's team approach for matters relating to discipline. During a walk-about, for instance, the SERT alerted Sam to a behavioural incident involving a student with an exceptionality who was refusing to take his medication: "I observed Sam go in and diffuse the situation with the child. She took his mind off of [the situation], got down to his level, and spoke very calmly." [Sam] placed trust in the SERT…[and] asked how to handle the current situation."

> Neil also explained how his SERT is invaluable in delivering inclusive education:
> I think they're the glue and they really keep it all together. They know the story of all of those students. They know the story of the students on IEPs. Yes, as much as we're responsible for enforcing and ensuring that the IEP is being utilized... they're the ones that ... truly understand the needs of the teacher as much as the needs of the student. …They know the story of almost every room ... as well as an administrator should and would, so they are wonderful.

The researcher's reflective notes confirmed that "[Neil] has great respect for his educational resource teacher. You can tell right away that [the SERT] has a lot of clout with regard to the management at the school."

In short, SERTs are influential members of a school community and viewed by some administrators to be as essential as vice principals in supporting inclusive education.

Resistance to inclusion: Communicating with parents. Three of the four principals reported they have encountered some opposition from parents of students with exceptionalities. Although Paul noted that he had "never been challenged and many parents

have been very supportive of the issue," he acknowledged that "some parents are still hesitant to have their kids on an IEP…sometimes parents may feel that their child is not as strong if they are on an IEP but we say it's to meet their needs at this present time."

Neil also remarked on his interactions with the parent community and how he promotes an inclusive program:

> That is the biggest challenge in terms of what current best thinking is and when trying to make that clear to the parents who just want more of one thing for their child, as opposed to a great deal of many different things that would benefit their child's learning. So that to me is a bigger obstacle than working with staff.

Claire also shared her experiences dealing with certain parents of students with exceptionalities:

> I have had opposition from some parents [when] they don't accept that their child has a problem. They are adamant they don't have a problem. …They are more in denial. …I'll state all the facts; at the end of the day it's [their] choice as a parent but [this] is what I know. I've been in the business for many years and these are the things you need to think about. ... Are you running away from a problem or are you running to a solution? If they are asking to move their child, for instance, running away is just going to transfer it to another school.

Claire also acknowledged her responsibility as an elementary school principal to understand the perspective of the parent: "I can't be annoyed by the parents. They're just doing their best for their kids. And I have to say over the last few years, I felt their frustration."

Interestingly, two participants described situations in which they had to remind parents of the school's inclusion policy when resolving physical conflicts involving students with exceptionalities and their peers who do not have exceptionalities. Neil described how he communicated an inclusive message with parents of a student who was involved in a physical incident with a peer with an exceptionality:

> We have that difficult conversation at times but [must] ensure that those students [with an exceptionality] have a place here at school. And those concerns ... have implications on programming, on [how] we meet the needs of our students. ... Concerns from parents have a direct effect on how we do business in the school; so that we may have to provide more support for a student if by chance safety is a concern.

Sam discussed her approach in handling a similar situation at her school during her first year as a principal:

> [There was a] very difficult situation, difficult parent. ...If I could go back, I would probably handle that parent with a little more TLC and empathy for their own situation. ...I know that I did a fair amount of work...however, looking back I might have done things a little bit differently in terms of trying, maybe if I would have empathized with their own situation more.

Sam described how the latter experience with a "difficult" parent of a student who was involved in a physical incident with a peer with an exceptionality shaped the way she now approaches similar situations with parents. She feels that her school's inclusive environment and her administrative abilities defuse confrontations with respect to physical incidences involving students with exceptionalities:

When you've established a culture of trust, fairness, consistency, across your

school and you already have that reputation, it's a lot easier. So parents will have

the dialogue in a rational way for the most part and even if people come in here

upset, ... I'm able to usually calm the person down and make sure that they

understand that that person, that child, didn't mean to do it, it was unintentional.

In this regard, principals become the defenders inclusive education and of students with

exceptionalities, as such conflicts situate the debate of inclusive education in real time

and with genuine emotion. It is through such emotionally challenging circumstances that

these principals "sell" inclusive education and prove they are champions for students with

exceptionalities.

Theme 2: Inclusive Collaborative Cultures

In addition to their managerial roles, the participants described the value of

creating, maintaining, and leading collaborative cultures (i.e., professional learning

communities, or PLCs) within their schools. PLCs enable all educators, including

principals, to collaborate on best practices for teaching pedagogy and to discuss strategies

for student success and school improvement. Principals who are inclusion leaders use

their PLCs to drive the inclusive focus of their school. These administrators also model

inclusiveness for their staff by creating an atmosphere within their school's PLC which

makes all members feel as though they belonged.

Sam explained that some administrators foster a sense of democracy in systemic

decision-making even if the decision is eventually resolved from the top of the

organizational hierarchy:

I'm not just having a meeting with people and then making the decision and

bringing it from the top down. Even though I know what in the end I really want

to do, I need to steer the conversation so in the end we come out with a decision

that I already knew I was going to make.

As an influential member in the PLC, Sam is able to guide the collaborative discussions

to arrive at her preferred outcome while still being viewed as promoting the values of

collaboration. Sam displayed such guidance during a walk-about. When resolving a

situation with a classroom teacher, the researcher noted that Sam "empowered her staff to

handle their own situations. She gave them advice of how to handle [the situation in

question] but also made it clear what she would like them to do." This model is beneficial

for Sam as her staff are provided with a platform to assist in the decision making process.

Sam and Paul explained how they help create opportunities for collaboration in

their school settings. Sam noted that

We have formal and informal [PLCs] because teachers are just innately always

learning. So they learn from each other and we have system and school based

learning. So those [PLCs]… could be a divisional meeting, it can just be grade

meetings, and it could be system pull outs where teachers come together to learn.

Likewise, Paul described the committees that make up his school's PLC:

We meet on a 6-week basis to review our goals in terms of what we start out with

at the beginning of the year. Then we have [Teaching Learning Critical Pathways]

which we meet every 6 weeks for, and then we have our Catholic school

effectiveness framework [an academic school improvement committee] which we

meet on a monthly basis.

Interestingly, Sam and Paul mentioned that informal communication regarding special education programming takes place on a regular basis; Sam explained that "Discussions take place everyday every single day" while Paul noted he engages in a "constant dialogue on a regular basis" and "talks about all students" to ensure that the needs of students with exceptionalities are taken into consideration.

The principals also referred to equitability when describing their approaches to creating and maintaining PLCs. Claire sought to create an equitable PLC as she prepared for the construction and opening of a new school so that teachers could be equally influential when participating in committees in order to create " a JK-8 school that was not divided by divisions." Claire noted that her school's planning committees collaborated for years and discussed a range of issues, such as inclusion of students with exceptionalities. In this fashion, Claire models inclusion for her staff so they in turn adopt inclusive practices that affect all students, including those with exceptionalities.

Neil supports Claire's vision for an equitable school and described how all members of the PLC take an active role in school improvement:

> We don't have "that" group who are a part of school improvement team. ... In order to impress upon people the need to be the champions for student success and certainly for differentiated instruction and meeting the needs of all students we all have to be on board. We all have to be part of that process. … I think I did a good job impressing upon everyone that there is not that token person for curriculum development in the school. We all need to be part of it.

Claire thus leads in an inclusive fashion; she "walks the talk" in terms of her inclusive vision for her student population and how she enfranchises all teachers equally

within the school's PLC. Neil similarly confirmed that all teachers need to take part in

being "champions for student success" and that administrators can encourage them to do

by modeling inclusive characteristics and adopting inclusive organizational practices.

Sam also promoted collaborative school cultures and emphasized her belief that

teachers of the same grade or division should have a common planning time, a best

practice through which teachers can "bounce things off of each other." Neil concurs and

emphasizes the need for teachers to learn from one another as professionals working

towards a common goal; he feels that the role of teachers is "basically to continue to

advance their knowledge ... and to actually teach others what they know," and to provide

"an opportunity to have others witness that in their classes by demonstrating a day in the

life of teaching students with special needs." Neil pointed out that the New Teacher

Induction Program (NTIP) allows mentors (i.e., experienced teachers) 4 to 6 days to

"meet with that [new teacher] and to watch them and they can come and watch you." He

also supports coverage activities that would allow teachers to observe one another:

> It would be a good opportunity ... if you wanted to see what one of your
>
> colleagues are doing, … [to] flip your time around and actually go watch them
>
> teach. Myself, and our ERT, we provide coverage for teachers that want to visit
>
> someone else's class but it does have to be based on something specific and direct
>
> what they are looking for.

Sam and Neil thus recommend schedules or coverage assignments that give

teachers time to collaborate and have a professional dialogue, which may include

discussions about inclusion strategies or observation of each other's own inclusive

practices in the classroom.

Similarly, the participants also indicated that support staff and teaching staff should be given opportunities to collaborate. Neil, for example, discussed how contractual obligations for support staff provide time for educational assistants (EAs) to consult teachers at the end of the school day "so that they are aware of what they can be doing, what they can do after school to support those students…what kind of activities we are working on in the homeroom with students [with exceptionalities]."

Likewise, Sam described the collaborative relationship between some of her teachers and EAs when providing inclusive placements:

> [EAs] have to be collaborative within their classrooms, so that their role with the teacher in collaboration is huge. …The teacher and an EA learn to work with each other, and they give each other eye signals, ... "maybe you need to take that [student with an exceptionality] for a walk because of [her/his] behaviour."

Paul also described EAs' role in inclusive education and expressed how important it is that teachers and EAs have opportunities to collaborate:

> [EAs] are sensitive to the students' needs. They amongst themselves are collaborative…they work very well together. They meet with the special education teacher; we ... have a separate EA meeting…on a monthly basis as well because there are so many of them. We will review various procedures that we think are important.

Paul, like the other principals, ensures that meaningful formal and informal discussions pertaining to inclusivity take place among classroom teachers, the SERT, and EAs—all frontline workers for inclusive education.

"School-based team" and "student update" meetings. School-based team
(SBT) meetings are a fundamental part of special education delivery in Ontario (Weber &
Bennett, 2004) and are a testament to how PLCs can realize a school's inclusive vision.
SBTs comprise school administrators, resource teaching faculty, classroom teachers, and
can also include support staff and external professionals such as psychologists and social
workers. Three participants discussed how their school's SBT operate. For instance, Neil
stated that the SBT process "ensure[s] that we are doing everything…we can to bring
forward or to the attention of the support staff" so that "all needs of the students are being
met, all the needs of the students are being discussed" by teaching staff who "speak to the
needs of their students, speak on behalf of their needs," Including those with
exceptionalities.

Likewise, Paul described how his SBT develops individualized programming for
all students with exceptionalities "through [the classroom teacher's] professionalism, and
through their dialogue with the special education teacher and board personnel." Sam also
reiterated the SERT's key role and involvement within the school-based team. Indeed, the
researcher observed that SERTs chaired all SBT meetings in which the principals
participated, thus underscoring the SERTs' important role in their respective school's
PLC with regard to inclusion.

"Student update" meetings. Participants also cited "student update" meetings as
an inherent part of PLCs, referring to them as opportunities for teacher accountability
through discussions amongst principals, teaching staff, and SERTs pertaining to students
at risk and the interventions they were receiving to achieve success. The researcher
observed Claire consult with teachers of each grade in a student update meeting, along

with the SERT, the English as a Second Language teacher, and the French language teacher. Claire met with the teachers to describe class profiles that placed students in categories based on their greatest needs. In her interview, she noted that teachers were "responsible for taking the tiered model and identifying which kids were where, in which categories" and describing interventions they had in place in the classroom. Claire ensured her team "monitored where [students at risk and with exceptionalities] were before the intervention and where they've been after." The researcher's reflective notes illustrate Claire's role in a student update meeting: [Claire] was very active in the meeting. She says that she delegates a lot of responsibilities, [but] she's very involved, she knows the students, and she knows their needs." Paul used a similar approach to ensure teachers meet students' needs:

> The teachers already know that, even when I sit down and plan with them, "what are you doing for so and so" and they'll tell us what they are doing. And then through myself and the special education teacher we may also opt for some more strategies to ensure that there is an inclusive environment.

Paul revealed that his teachers are aware that he will investigate the accommodations and modifications being made for students with exceptionalities. He explained that this is his style to ensure that inclusion is taking place.

Neil, like Sam and Paul, said it is important that teachers "tell the story" of all students (especially those with exceptionalities) during student update meetings, particularly when discussions turn to students' transition to the following year:

> I think one way that we can make things better is to clearly ... articulate the story of each child at the end of the year. …As the story teller, as the champion for that

student, as clear as [the teacher] tells the story, the clarity in which [the teacher]

used to tell that story, there is a direct correlation to the clarity and the intent

used to program for that child for next year. And if [the teacher] can't speak for

that student or about that student with credence and clarity and efficiency, then

the person that receives [the student] is really at a loss.

Ultimately, principals use PLCs, and more particularly student update meetings to have

collaborative conversations with all staff members, ensure that inclusion is taking place

in each classroom, and identify the intent of programming and the appropriateness of

interventions, accommodations, and modifications that are being delivered.

Theme 3: Inclusionary Cost Analysis

Inclusive principals are compelled to develop programs for students with

exceptionalities within the parameters of external funding. As such, it was not surprising

that three of the four participants discussed current Ontario Ministry of Education and

school-board funding for students with exceptionalities. Sam identified the difficulty of

systemic planning for students with exceptionalities for school boards with declining

enrolments: "Our board, as I'm sure [for] other boards ... is in declining enrolment and so

we've cut back in all areas but [special education] was heavily affected this year." Claire

too discussed changes in funding allocation over the years:

My biggest frustration is, I've been 36 years in education and ... I guess I'm

spoiled a bit. I'll be honest with that; I came through the good years where there

was a lot of money and then there was a lot of tightening up, but I don't think it is

as simple as that. I think that we need to be more proactive rather than reactive.

Claire feels that funding for inclusion should be allocated proactively instead of reactively (such as calling in an EA in response to a situation).

Neil, on the other hand, described a positive experience in which Ministry of Education funds for students with exceptionalities had been allocated for individual elementary and secondary schools in his board:

> We share a lump sum...between all schools...I think [the Ministry does] a fantastic job trying to cipher who really needs [funding] and who can do without. Maybe for a short period of time, maybe for a time being. ... I think one of the issues that we deal with, that we actually come into contact with, is really based on the identification of "do we really need [funding]"?

Neil evidently has a broader, systemic view of funding. He feels that the checks and balances in place in his board allocate funds in an equivalent manner. During a conversation with the researcher on a walk-about, Neil confirmed this opinion that there must be a demand or a need for resources to be allocated to a school and that these needs are reassessed on a regular basis:

> If one school graduates a student with special needs to a high school or from high school into postsecondary, those needs would change and for the school that would be losing a student with special needs and not replacing them, the [overall school] needs would be changing and those resources would have to be reallocated.

Neil's pragmatic point of view may reflect his involvement with special education services at the board level in addition to his role as a principal.

Funding inclusive schools within allocated budgets. Inclusionary elementary school principals are tasked with securing financial and human resources from their school board and fundraising at the school level to bridge any gaps in funding, usually for extracurricular programs or resources. Three of the four participants said inclusion for students with exceptionalities is allocated resources because it is part of their respective board's mandate. Neil explained that "our approach...and philosophy as a board is inclusivity so we simply believe in that." Likewise, Paul noted that his school, "just like the board," has always been inclusive: "For 40 years it's been a school board initiative. ... And many of the parents in the area who have their kids here thoroughly enjoy the inclusivity aspect 'cause their kids are all integrated, all in the classroom." Sam, who is a principal in the same board as Paul, agreed: "We believe that each student can learn given the right supports. …That's been part of our philosophy forever."

Still, the amount of financial, human, or instructional resources (which Sam refers to as "supports") necessary to deliver inclusive education is a contested issue amongst educational leaders with regards to programs for students with exceptionalities. All participants described the pressures of managing inclusive elementary schools with constraints on the available human and financial resources. Paul acknowledged "some economical constraints" but said that his school was "usually able to manage." Though he noted that "EAs are at a premium," he added that it as "a minor issue" and that his school does "the best we can to accommodate all."

Sam, on the other hand, said that the situation for her is more critical: "My allocation [human resources] for next year ... is heavily reduced. I'm down to half of

what I had because of budget cut backs." Likewise, Claire spoke of the challenges and the emotional toll of trying to be inclusionary in spite of limited human resources:

> We're always looking for...resources. ... We don't have the manpower always to reach all the needs. We do the best we can, and over time. It's a culture shock for a first-year teacher, and they'll often describe it, male and female, that it breaks their heart, whether they're a VP or they're a teacher.

While Neil understood the other participants' frustration at trying to deliver inclusive placements with limited resources, he felt strongly that the task ultimately will get done: "An inclusive school does not ... say 'we can't,' or 'we don't have enough support'; we find it and we make it work." All in all, the four administrators showed their tenacity when dealing with limited human or financial resources and persevere to meet the needs of their students.

Creative use of human resources to maintain inclusive schools. Facing such funding constraints, the four participants described occasions during the past year when they needed to reorganize their teaching and support staff to better deliver inclusive programming. During his interview, Neil explained that a supply EA was called in that very day to fill in for an absent regular EA who was absent, but that doing so created its own challenges as the supply EA was assigned to "one of our students who has a difficult time working with new people. So, it takes its toll."

Other participants discussed similar staffing challenges in the delivery of inclusive programs. Paul hires casual EAs on a temporary basis as required: "We have such a high number of special needs within the system, EAs sometimes are at a premium. However, we've been able to get casual ones for 6 weeks to help us out, to help us over

the hump." Sam discussed a situation in which she needed to bring in an EA to ensure

staff and student safety while still fostering an inclusive environment: "[A] child with

autism came to me this year. ...He's significant in terms of his behaviour. ...In the last

couple of weeks, I have had to fill out numerous accident reports [because of him] for

students and staff. ... I want this child in the classroom, but I need the support."

Claire shared her rationale for a related staffing matter in which she hired long-

term occasional (LTO) teachers to replace teachers on maternity leaves: "In our autistic

primary class, [the teacher] went off on maternity leave. So we did know of one teacher

who has some expertise in autism and we were able to get her for the LTO." Claire

added that "We had another lady who has [a student with autism] in her class...who

went off very early on a maternity leave...and again we chose someone with very

similar temperament, calm, cool, collected. So we interviewed three people for that."

Claire provided insight into her hiring rationale; she values candidates with calm

personalities who also have experience with special education and, more specifically,

with students with autism. Claire placed merit on humanistic qualities, such as

temperament, as she felt that it was important to create a similar classroom experience for

the students.

Such examples illustrate the importance that inclusive leaders place on human

resources—both teaching and support staff—to maintain inclusive schools. These

administrators, who are effective inclusion leaders, accommodate their students' needs by

selecting teachers who embody humanistic qualities.

Purchasing resources to deliver inclusive programs. Principals also purchase

resources to assist in the delivery of inclusive programming. Three of the four

participants shared their positive experiences when making such purchases. Paul stated that "Any time that we are in need of something...we may need a locker of some sort...we contact our board personnel...and they are here very quickly." Sam described how she purchased materials during school renovations to make it more accessible for persons with exceptionalities: "Where you spend money speaks volumes…even our fountains and our washrooms are wheelchair accessible upstairs...You put your money where your mouth is."

Claire's school is a newly constructed elementary school that amalgamated two former elementary school communities. She described the working relationship with her superintendent who "has been very generous...He has given a lot of money for equipment that makes things more accessible to those kids, that makes them more included." She also discussed how she allocated her school board's funding for resources for the new elementary school: "We decided [on] technology. These kids won't get it at home. ...Over half of our $400,000 went on smartboards, computers, front-row sounds, document camera essentials—you name it, we've got it."

The participants also discussed instances when they needed to secure additional resources at the school level. Three of the four participants described how they canvassed their local communities for funding and applied for grants to support their inclusive programs. Paul said his school board's student support department assists him by supplying appropriate community contacts: "They are there to offer their strategies...and they may put us in touch with people in the community to help out." Claire explained that her school has received donations from institutions such as churches and community partners, including businesses: "Our Snoozelan room was built through donations; $3,000

from [Ontario Principals' Council]—it was a grant for eliminating barriers to education."

Sam's school has also benefited from applying for grants:

> Every year I've been successful in obtaining [the Parents Reaching Out grant] and
> what we are going to do is enhance our parent library because there is a couple of
> things we need to buy [such as] books on Autism. ...Parents can take them out in
> our school parent resource library.

As financial resources are limited, these three participants indicated that shrewd

principals are aware of and make use of additional funding opportunities.

"Schmoozing," building and maintaining positive collegial relationships in

order to access resources. Claire and Sam both illustrated how being savvy (or what

Claire referred to as "schmoozing") or charismatic can help secure additional financial

resources. Claire described a circumstance in which she "tapped out" her staff's

professional development budget and explained to her superior how additional support

would benefit her teachers and students; as she remarked, "we're just always out there

kind of scrounging. We call it schmoozing." Sam explained that her personal reputation

as a principal benefits her when she requests additional support for special education

needs: "They know my work ethic and they know I don't ask for money or for support

unless I truly believe that it's necessary and good for kids."

Claire and Sam also said they use their professional relationships to assist them in

offering services for their students. Claire shared how a fellow principal assisted her

school by fundraising to support programs that her board school could not fund: "I went

to the leadership conference 4 years ago...and I was rooming with a principal in a more

affluent area. They've become our sister school." Sam described a similar incident in which a colleague assisted her in providing a placement for one of her students.

It is clear from the above examples that effective inclusive principals maintain supportive relationships to support and advocate for each other's school communities.

Theme 4: Defining Inclusive Environments

All participants discussed their respective elementary school's inclusivity and it is evident that their personal philosophies influence school culture. Paul and Neil described the concept of inclusion using pragmatic logic—it simply is the way it is. Paul articulated that all students should have access to education and this can be achieved in a regular classroom setting:

> All students can learn regardless of their educational background, regardless of their background, regardless of any physical disabilities or any learning disabilities. ... All students learn. ... All students are included in every aspect of the classroom. Their educational program is either differentiated or modified or accommodated.

Neil noted that his role is to encourage his teachers to program and deliver lessons using a differentiated instruction methodology. He impresses upon teachers that combined or "split' classes may most effectively meet the needs of multiple groups of learners: "You have to teach as if you have three, or four, or five really different learning styles in the class, which you normally do anyway. And try to provide them with opportunities to demonstrate their learning."

While Paul and Neil reflected on their experiences in fully inclusive schools, Claire shared the positive effect that even partial integration has on students who interacting with their peers in an intensive autism program:

> A lot of the kids...think they're quite bright. Like they've read on it and they've watched PowerPoints and have come down and interacted with them in small groups so that they don't overwhelm them, but they see the strengths more than they see the weaknesses. ...And because there are so many of them in their classes, since [junior kindergarten], they've come to just kind of accept it.

Claire's inclusive vision for her elementary school indicates how she frames her role as an inclusive principal in a less inclusive school board.

Paul also commented on how students with special needs are included within the larger scope of the school community:

> All kids are included in everything. ...They have the opportunity to be included in everything. For example, at a mass, when we bring the gifts up, one of our students who is in a wheelchair will bring up a gift. These kids are included in our choirs, Play Day, any type of activity we have in the gym, and obviously their role is accommodated; it's differentiated, but they're included in every aspect.

Sam (who also is the principal of a Catholic elementary school) described how students with exceptionalities were included with their same age peers in preparation for their Catholic Sacraments of Initiation: "We've had a number of students receive their sacraments and again they went into those other classrooms to be able to prepare for those things . …And it was absolutely ... tear-jerking, beautiful. … [Inclusion] is part of our [Catholic] culture."

Even in her less inclusive school board, Claire noted that her students with exceptionalities are integrated in

> recess, phys-ed especially, camp days and the dance—that type of thing. Some are integrated right into the classrooms. So they just go out to access the computers in the [common areas shared by a few classrooms] but they spend most of their time with support.

Recognizing the inherent benefits of inclusion, Claire also explained her goal of increasing the natural interactions between students who do not have exceptionalities and their peers with exceptionalities: "I'm thinking the secluded classes are the ones I want to increase the integration. The others are integrated." Although Claire's board still has segregated placements, she sees the benefits of inclusion and acknowledged a desire to increase so-called integration within her school community.

These varied examples show that although the participants are at different stages of providing inclusive placements for their student population, they all agree that students with exceptionalities should be included in the day-to-day life of their school community.

Three of the four participants acknowledged such a sense of community that is inherent in inclusive learning environments. Sam discussed the cohesiveness and regard for human belonging:

> There is no mocking [students with exceptionalities], there is no put downs, they belong with us. And I say this about staff and I say this about kids; [they both] capitalize on everybody's strengths and minimize weaknesses. So, that's going to create an atmosphere where everybody's best comes forward.

Neil shares a similar vision and points out that many students are introduced to inclusive education at a young age, in the kindergarten years, and proceed to learn side-by-side throughout their elementary schooling:

> I think basically its developing tolerance, its developing empathy...developing forgiveness when things don't occur that are appropriate in a regular setting. And just an awareness that there are people that are different than us and there are people that have a challenge.

Claire discussed a particular example of acceptance among peers that in an integrated classroom:

> Ben, for example, eats his lunch with Cameron and Evan who are autistic. And he's pleased to do it. He considers them friends and they're lost without him when he is not there. ...He's just a really good role model for them. He's very patient with them, washing their hands and the life skills [that] they don't have naturally; he's coaching them through them.

These participants share a common definition of inclusion in which everyone belongs and respects each other. These participants acknowledged how the inclusive vision for their schools has created a greater sense of community.

Benefits of inclusive education. Inclusive education benefits both students with exceptionalities as well their peers who do not have exceptionalities (Bunch & Valeo, 1997; Farell et al., 2007; Norwich & Kelly, 2004; Porter, 2008; Wiener & Tardif, 2004). Paul and Neil both emphasized the importance of inclusive placements for students with exceptionalities. Paul stated, "Each belongs. All students can learn. They are part of the regular classroom; they are part of the regular school workings." Likewise, Neil feels that

inclusion provides identified students with an opportunity "just to experience life as the rest of the classmates are experiencing. So, they don't have to get the Coles Notes version of it because they've missed something."

Interestingly, there were numerous comments about the benefits of inclusion for students who do not have exceptionalities (which may suggest that participants considered the benefits for students with exceptionalities as being too obvious). Paul focused on the leadership qualities that students who do not have exceptionalities can gain when working with their peers with exceptionalities:

> They have an opportunity to assist the kids with exceptionalities, to be leaders for these kids, to help them and to give the resilience, ... to be the best they can be. So although they may not be working directly with the child, at least they are role models, and the exceptional students can rely on these kids for help—and its worked out wonderfully.

Claire and Neil believe they are preparing all of their students for society by teaching acceptance of differences. Claire feels that students should learn tolerance and understanding of one another while learning together. As her school has higher incidences of poverty and a greater number of English language learners, she made the connection that perhaps all students could in one way be "identified":

> Whether its language, or exceptionality, probably there is nobody that couldn't be identified in some way at our school of being at risk; ... whether it's the challenges of poverty or it's academic. ... So I think they have a richer environment in that they see a lot of diversity within the school.

Claire's school also began an initiative to teach intermediate students to be advocates for their peers with autism. The school printed business cards that explained some of the common behaviours associated with autism spectrum disorders and disclosed how autism affects several children in their school community. The cards were made available to intermediate students who could then distribute the cards to members of the parent community.

Neil argued that inclusive placements prepare all students for the diversity they will encounter in the real world:

> It provides them with a dose of reality because whether you're looking at mental issues, or ... learning disabilities, ... or developmental disabilities ...we live in a society with people with special needs. ...and sheltering our students from that reality is not appropriate. So, I think just providing them with that real chance to be elbow to elbow, knee to knee with one of our students with special needs provides them with a good dose of reality that this is what the world is like. ...This is what the world is.

In this fashion, these administrators are appealing to the higher order needs of students by facilitating an environment that embraces difference and promotes respect and belonging.

Inclusion placements outside of the regular classroom. Surprisingly, all participants discussed alternative placement options for students with exceptionalities. Although Paul, Sam, and Neil are administrators of fully inclusive schools, they each discussed circumstances in which alternative placements were the best option for particular students with exceptionalities. The researcher observed Paul during a meeting

in which he informed staff that an individual student was selected for a withdrawal program to assist with reading instruction.

Similarly, the school based team at Neil's school called a meeting to discuss an individual student who was selected for a specific reading program. Reflective notes indicate that

> This student was going to be transitioned to a pathways program. ...It was going to be a day program. ...This child has poor reading skills, [and is] reading at a primary level in Grade 6. He can understand comprehension, however decoding is an issue. ...This child has been on a waitlist for 3 years.

In the latter case, Neil was able to "include some anecdotal notes, experiences or past interactions with the child. This shows that he is aware of the students being discussed."

Sam also had an experience that resulted in a change of placement for a student due to behavioural and social reasons. Sam emphasized that these are "rare" circumstances in inclusive school boards and these decisions are not treated lightly:

> We have actually tried 4 EAs with that student. ...We all tried to work with him. We all tried to bring the best out of this child. Unfortunately, family dynamics...this child has got a lot of anger and a lot of the school community knows what happened with this family. So, we thought a fresh start at a neighbouring school close by [would give him a fresh start]... we met with their SERT and principal, and me and my SERT went over...with our board resource people...and we put a plan together and it's working beautifully.

These particular cases show that although participants firmly believe in an inclusive model and philosophy, at times other options may be appropriate for certain students.

In contrast to these cases, Claire—who is an administrator of an integrated school with secluded programs for some students with exceptionalities—discussed her plan to increase the inclusionary experiences for her school community:

> Going forward, I want to see more integration. It's at a minimal level right now and I think now that our kids are better established. ...It's not a new school anymore, some of our [autism spectrum disorder] kids have been here 2 years; speech and language is always a 1-year stint and they are in and out, but they should be able to integrate.

This example shows that principals who work in fully inclusive school boards may still decide to place students in placements outside of the regular classroom if feel it is the best option for a particular student. Conversely, principals like Claire who work in less inclusive school boards that include schools designated to offer specialized programs for particular exceptionalities may prioritize inclusion and focus on including these students in the school community to contribute to their sense of belonging.

Theme 5: Humanistic Qualities of Effective Inclusive Leaders

Lastly, empathy and compassion was a distinct leadership quality evident in all participants as they discussed inclusive education for students with exceptionalities; it was clear they equated inclusive placements as the morally "right thing to do." The four participants commented that inclusion is part of their vocation. Paul, an educator with 23 years' experience in his current board, noted that inclusion is "a part of my fabric. ...It's just part of the many facetted things that we're exposed to on a daily basis." Sam similarly noted that "[Inclusion is] just part of who I am" while Claire summed up her

view of inclusion by saying "I think it's that simple. ...All kids [can] learn." Neil supports

Claire's belief:

> An inclusive school has something for all students, and that something is certainly
>
> based on their specific real need; and ... part of offering that instruction [should
>
> include] built-in next steps that would lead them to some sort of success in the
>
> future. ... An inclusive school provides all students with what is equal opportunity
>
> or specific opportunity with regards to their specific needs.

The four participants described how they witnessed the benefits of inclusion

during their postsecondary studies or years as classroom teachers. Claire said she was

exposed to and embraced an inclusive model in her teacher education program: "We

didn't like how we were taught. We saw new ways of teaching which are more engaging,

more inclusionary, and so that made us very interested in pursuing [inclusive education]."

Sam cited a positive inclusion experience in her first year as a teacher:

> I had a child who was hard of hearing. ... Those are probably the most rewarding
>
> kids when you see the gains; they may seem very small, but they're huge gains for
>
> those children. Then you feel that inside; it's just beautiful.

Likewise, Paul reflected upon his experiences with inclusion during his teaching

career: "I remember the students very vividly; they all participated, they were ... part of

the class. ... One day [they are] going to set out but at least they have been part of a

classroom; they've been part of the community." Neil's support for inclusion was

heightened when he witnessed students returning to their neighbourhood school after

being segregated:

I saw how much students benefited by being with their peers. ...Age-appropriate

peers, doing what they are doing, and just experiencing the day at the same time

as everybody else, whether it was something funny that happened at recess, or

that goal that they scored in phys-ed. ...You need to provide students with an

opportunity to just be kids with other kids at the same time.

Ultimately, Paul and Neil, much like Claire and Sam, view inclusion as building an

inclusive community in their classroom and believe that students benefit from learning

together, which echoes Vygotsky's (1978) social constructivist belief that learners

construct knowledge through social interactions with each other.

Humanistic leadership: Principals' compassion and empathy. As noted above,

the four principals discussed how inclusion was part of who they were; it therefore

follows that empathy and compassion are an intrinsic part of their leadership style. Paul

discussed an interesting dichotomy of being an empathetic leader of inclusion:

You have to be a caring individual; respectful of all, respectful of parents, the

teachers, and all the kids. Within that guise of respect and caring and through

teacher support and special education support, we are able to program for all kids,

through modification [and] differentiated instruction. ...But as an administrator

you need to make sure that these kids are...having their curriculum delivered, they

are treated with respect and care in the classroom setting.

Paul thus believes that effective leaders of inclusion must be a compassionate but also

proficient enough to oversee the education plans of all students with exceptionalities.

Neil shares Paul's opinion:

As a leader in Catholic school of a group of individuals in the school, I need to

demonstrate empathy and compassion. Making sure that we are inclusive with all of our special needs students provides the students with that opportunity to interact with these students [with exceptionalities].

Paul and Claire's empathic leadership style also extends into their interactions with their staff. The researcher observed that Paul treated his teaching staff with dignity and respect during a school-based team meeting:

When the next teacher joined, [Paul] was very welcoming. [He] offered his chair. He was okay to stand. I think this goes along with his personality that he is very calm, welcoming. ...He operates a productive school; however, his management [style] is very calm, welcoming, and relaxed.

It was clear that Paul maintains a welcoming atmosphere in his school, which is conducive to the creation of an inclusive learning environment.

Likewise, Claire feels that her role as an inclusive leader with her teaching staff is to "bring the best out in everybody":

I don't need the praise. ... As a leader, one of the most important things you do is check your ego at the door in the morning. ... I think you need to give respect before respect is earned. And I think you need to give the praise away even though you might have got the ball running.

In short, Paul and Claire demonstrated that humanistic leadership involves considerate relationships with staff.

Empathy for students with exceptionalities and their parents. Much as they did with their staff, the participants also expressed compassion and empathy for their students with exceptionalities. Paul for instance said that he views all of his students

equally:

> They are seen as a normal child within the classroom. They have that dignity. They are treated with respect and they are part of the fabric of the classroom. When I look at all of my 440 students, they're all in my eyes equal. And although.. each and everyone could have an exceptionality, all those kids to me are equal. They are equally treated [and] are given dignity, respect, and the ability to learn within the classroom setting.

Neil equates inclusion with the Catholic principles that are inherent in his school as he discusses the benefits of inclusion:

> As a Catholic school, we were always inclusive. And looking at the needs for students with special needs, there was also that nurturing of the soul that having those special needs students in our schools certainly helps us to understand what our role is with regards to being a champion for them and actually respecting all the small milestones that they actually achieve.

Sam evinced compassion as she discussed a bullying incident involving a student with and a student without an exceptionality:

> We will not tolerate rude and disrespectful behaviour. ... I might have a conversation; I might bring in a child who's made fun of somebody. This year, we have a child who has a physical disability. One boy last week [teased him]. So, we brought the child in and we ... talked about feelings and stuff like that in a restorative justice session. ...That's how you get through to kids; not by crucifying [them]. ... You have to explain why that hurt people's feelings.

By turning the incident into a teachable moment to reinforce tolerance while disciplining a student, Sam reinforced her school's inclusive mission and essentially modeled empathy and compassion.

The researcher also witnessed Sam's compassion in a situation involving a junior student with an exceptionality who had left a classroom abruptly after a disagreement with a teacher. After resolving the issue and discussing appropriate strategies for dealing with her anger, Sam made the student feel important:

> [Sam] made her feel very special…So that was significant to see how she took a [potentially negative] situation [for the student] and turned it into a good one [by making] the child feel happy so that she would still like to come to school. However, [Sam] also reinforced that the rules still apply and taught her how to go about fixing the situation [in the future].

Three of the participants also demonstrated their empathy and compassion by displaying maternal or paternal characteristics when disciplining or dealing with students with behavioural exceptionalities. Claire exhibited maternal traits as she assisted a boy in kindergarten who was having a fit of temper. The researcher noted that

> Claire is very civil with her students. ...There was a JK student who bit another student. ...She was able to calm [the boy] down. The boy at first started to say, "I don't like you." He got really upset; he was crying. He then had a bit of a fit on the floor. [Afterwards, he said] "I don't want to be a bad boy." She was able to calm him down, and talk to him about the biting behaviour. I found that she could be firm, but she does it in a fair way; respectfully.

Paul demonstrated similar care when he assisted a young student who was waiting

for a ride after being suspended for physically aggressive behaviour:

> He was helping the student put his boots [and] his snow pants on. ... This
>
> demonstrates [Paul's] compassion...but it also was a way to diffuse the situation. I
>
> thought the way he interacted with the child was great to see. ... [Paul] said [the
>
> boy] was going to be able to roll up the rim when he returned.

Paul acted in a fatherly manner as he assisted the young primary student with his snow pants and boots. He reassured the boy that although he was not pleased with his behaviour, that he would be welcomed back and would be able to "roll up the rim" on his coffee cup when he returned from his suspension.

Sam expressed her motherly traits when discussing a situation in which she sought alternative placement for one of her students:

> The day that he went over I felt like I was an abandoning mother. ...My heart was
>
> breaking but I went over [along with her school's SERT] with him. We made sure
>
> he was comfortable. ...On the day that it happened ... we all cried but we all knew
>
> that change had to happen so that he could get better and he could create a new
>
> way of dealing with his anger.

Clearly, Claire, Paul, and Sam are compassionate leaders who care about their students as if they were their own children.

Empathy for parents of students with exceptionalities. The participants also showed compassion for parents of students with exceptionalities. Paul described his role when working with such parents:

> My role would be a resource...who tries to get the students further help. My role
>
> is also to reassure the parents that we have the child's best interest at heart. That

takes time. And that we're on a journey together but at least things are available to

the student in an environment of Catholicity.

Paul said that he communicates with parents of students with exceptionalities to apprise

them of the benefits inclusive programs and does so for the duration of the student's

school career.

Claire expressed the compassion she felt when dealing with parents of students

with exceptionalities:

I don't understand the pressures of raising a child [with autism]. I just have a

window into that as an administrator and I get frustrated, so I can't imagine doing

it all day, every day, trying to advocate for them and getting them resources.

...And I have to say over the last few years, I felt their frustration as I've tried to

educate my peers and my colleagues.

It is worth mentioning again here that all four participants have a personal

experience with a person with a disability outside of the school setting (Claire has a

friend with a disability, while Sam, Neil, and Paul have immediate family members with

a disability). Two of the participants shared how their personal experiences have helped

them to understand and empathize with parents of students with exceptionalities. Sam

said "the fact that my sibling has a disability certainly is a factor because I have empathy

as a sibling. I know what parents go through. I know what that child possibly feels." Neil

also commented on his feelings as a parent of a student with special needs and said that

teachers need to remember the genuine responsibility of inclusive education for students

with exceptionalities: "Being compassionate, and certainly, genuine...lend very well to

teaching children, but you have to be very astute, you have to be very wise, and you have

to be willing to want to be a student... all the time." As a father as well as a principal, Neil believes that educators hold a fundamental societal role that requires integrity and consistent professional development to meet the learning needs of all students.

Summary

This study investigated four elementary school principals who were nominated by their superiors as exemplary leaders of inclusion for students with exceptionalities. The study examined how elementary school principals create and maintain inclusive learning environments for all students in their role as inclusive leaders of their schools' professional learning communities. The following chapter reviews the study's five themes addressed in the presentation of results.

The first theme corresponded to the administrative processes that principals use to promote inclusion as leaders in inclusive elementary schools. Although the participants had unique interpretations, they all said their essential role as elementary school principals is to ensure inclusion is advocated for and that it is taking place. The principals also confirmed the vital role of the special education resource teacher (SERT) in supporting inclusive education. The participants also disclosed how inclusion leaders resolve opposition from the parent community. These principals show that they are champions for students with exceptionalities through these challenging circumstances, and still "sell" inclusive education when emotions are tense.

A second theme suggested that in addition to their managerial roles, elementary school principals must create, maintain, and lead collaborative cultures within their schools. Principals who are inclusion leaders use their PLCs to drive the inclusive focus of their school. The participants modeled inclusiveness for their staff by creating an

atmosphere of collaboration and collegiality within their schools' PLCs that made all members feel as though they belonged. Such collaboration encompasses school-based teams and student update meetings that help identify the intent of programming decisions, and the appropriateness of interventions, accommodations, and modifications that are being delivered.

The third theme looked at how inclusionary elementary school principals are tasked with securing financial and human resources from their school board, and fundraising at the school level to bridge any gaps in funding, usually for extracurricular programs or resources. The participants persevere when dealing with limited human or financial resources to meet the needs of their students, sometimes enlisting the help of teachers who embody humanistic qualities in order to accommodate students' needs. There is also a clear correlation between resource purchasing and an inclusive elementary school's vision; as financial resources are limited, principals must be shrewdly aware of funding opportunities and tactics (such as "schmoozing") that could secure additional financial support to help deliver inclusive programs for students with exceptionalities.

The fourth theme addressed participants' understanding of inclusive school cultures. They shared a common definition of inclusion that essentially affirms that "everyone belongs" in an inclusive learning environment. The participants explicitly affirm that inclusive education benefits both students with exceptionalities as well their peers who do not have exceptionalities. Surprisingly, each of the participants discussed alternative options for placements for students with exceptionalities. Conversely, the principals who work for less inclusive school boards that designate specific schools for particular exceptionalities may prioritize inclusion and focus on fully including these

students into the school community.

Lastly, the fifth theme revealed that all participants displayed a distinct leadership quality ingrained in empathy and compassion as they discussed inclusive education for their student populations. The four principals revealed that inclusion is not something they need to justify; it is a part of who they are. The participants also expressed their compassion for their students with exceptionalities and their parents, as well as for their teaching staff. Some participants displayed maternal or paternal characteristics when disciplining or discussing their involvement with students with behavioural exceptionalities. Finally, the participants' personal experiences with family members or friends with exceptionalities have shaped their inclusive leadership and augmented their compassion for students with exceptionalities and their parents.

Chapter 5 discusses these findings as well as implications for educational theory, instructional practice, and further research.

CHAPTER FIVE: SUMMARY, DISCUSSION, AND IMPLICATIONS

This study sought to shed light on experiences of elementary school principals who are leaders of inclusion within their schools' professional learning communities (PLCs). The researcher identified and documented attributes of four elementary school principals (from three Ontario school boards) who create inclusive learning environments for students with exceptionalities and are recognized leaders of inclusion within their schools' PLCs.

As inclusion guarantees equity for all individuals within society (Frattura & Capper, 2007; Theoharis, 2009), it is important to familiarize and introduce children to inclusive environments in one of their earliest transitions towards adulthood: elementary school. School principals, as inclusion leaders, play a key role in the establishment of such social environments (Riehl, 2000). Because administrators set the tone and direction of their respective schools (DuFour, 1991; Mitchell & Castle, 2005), they must foster a cohesive relationship and team approach among school staff and encourage all members of the PLC to facilitate and ensure inclusion for all students. Consequently, this study set out to identify: (a) how the participants established inclusive learning environments; (b) what they encounter in their roles as inclusion leaders in their schools' PLCs; and (c) how they delegate duties to advance and sustain inclusive learning environments for all students with exceptionalities. The researcher sought to answer these questions by conducting a qualitative study (Creswell, 1998; Gay et al., 2012).

Summary of the Study

The participating school boards' supervisory officer responsible for special education provided lists of elementary school principals who were recognized for excelling in their roles as inclusion leaders for students with exceptionalities. The

researcher randomly selected participants from the lists and documented the participants' attitudes and practices.

To validate the accuracy and credibility of the study's findings, the researcher used multiple research instruments to ensure adequate triangulation. The researcher validated the instruments (interview protocols; survey) through a pilot study involving a single principal participant. Expert practitioners (four former elementary school principals and a former supervisory officer responsible for special education) also provided feedback on the study's research instruments.

The four participants were interviewed twice between October 2010 and June 2011 for approximately 60 minutes. The interviews were audio-recorded, transcribed, and member checked by each participant. On three occasions between October 2010 and June 2011, the researcher observed each participant facilitating staff meetings with special education teachers and support staff, and a walk-about through their school. The researcher took notes and audio-recorded verbal descriptive and reflective comments which were then transcribed, analyzed, and coded. Quantitative data were also collected from participants' responses to a modified version of Praisner's (2003) Principal and Inclusion Survey (see Appendix E). The survey drew connections between attitudes towards inclusion and placement perceptions, personal experiences with an individual with a disability outside the school setting, and professional development.

The study used thematic qualitative analysis (constant comparative method) of data to find common themes in interview responses and reflective field notes (descriptive and reflective notes from the observation template as well as the researcher's audio-recorded verbal comments). The first step for data analysis was a preliminary read of all

data during which time the researcher recorded memos in the margins to begin the search for recurring themes. Next, the researcher separated and coded data into common categories of recurring concepts which were then examined for similarities, differences, and possible connections, and subsequently clustered into five preliminary themes (discussed below). The researcher reviewed the data and highlighted passages for inclusion into one of the corresponding themes and into appropriate subcategories that were further developed, merged, or purged altogether. The researcher used a multifaceted matrix to synthesize the data which showed an equivalent distribution of data among participant, theme, and source of qualitative data. The following summary reviews findings with reference to each of the research questions.

When investigating the first research question, "How do elementary school administrators conceptualize an effective inclusive learning environment, and how do they endeavor to create one in their schools?" it became evident that there were common elements in participants' definitions of an inclusive learning environment. The principals consistently emphasized the importance of including students with exceptionalities in the day-to-day life of their school communities. The participants' personal philosophies of inclusion permeated the overall culture of school community. They each acknowledged how an inclusive vision for their school has created a greater sense of community in which all students feel as though they belong. They also discussed the benefits of inclusion for students who do not have exceptionalities, such as teaching them tolerance.

The second question, "What do elementary school administrators report that they encountered as they attempt to establish and maintain an inclusive learning environment in their schools?" explored participants' responsibilities and challenges in establishing an

inclusive learning environment. One of inclusionary principals' tasks is to secure financial and human resources from school boards and to fundraise at the school level to deliver inclusive programs. Working within funding constraints, the participants articulated how they carefully allocate human resources (i.e., teachers and support staff). They each demonstrated their tenacity and perseverance when dealing with limited resources to meet the needs of their students; savvy principals, for instance, garner additional resources for their school communities by "schmoozing."

A second challenge related to student placements, including circumstances in which participants were faced with less inclusive placements for particular students with exceptionalities. For principals working in fully inclusive boards, making a placement outside of the regular classroom was not taken lightly; however, they deemed this as the best option for certain students. In addition, three of the four principals revealed they faced resistance to inclusion from some members of the parent community. The participants demonstrated they defend inclusive education and address parent conflicts effectively to contextualize debates on inclusive education; they reassure parents that safety concerns are taken seriously and that there are protocols in place. They also indicated they possess the skills to de-escalate sensitive confrontations. It is through such challenging circumstances and the act of "selling" inclusive education that these principals show they are champions for students with exceptionalities.

The third research question, "How do elementary school administrators delegate duties with respect to establishing and maintaining an inclusive learning environment for all students with exceptionalities?" prompted participants to reflect upon their leadership styles and managerial duties. They each identified distinct perspectives of their roles,

such as: acting as a resource for inclusion to all stakeholders; accepting that inclusion affects and encompasses all of their day-to-day affairs; advocating for differentiated instruction for all students; and lastly, championing staff's professional pursuits. The participants articulated that they embrace and expect inclusion, and see to it that such practices are carried by their teaching staff. The participants also emphasized the special education resource teacher's (SERT) vital role in the PLC and delegated authority to help meet the needs of all students.

The study's fourth research question, "What do administrators experience as inclusion leaders in their schools' professional learning communities?" provides a glimpse at the principals' many roles. In addition to their managerial roles as elementary school principals, they must also create and maintain collaborative cultures within their school and be leaders within PLCs. The participants revealed that informal communication regarding special education programming takes place on a regular basis and that striving for equitability within school-based PLCs is paramount. School-based team meetings and student update meetings were described as collaborative conversations in which administrators ensure inclusion takes place in each classroom. Such meetings were also used to re-establish the intent of programming decisions and the interventions, accommodations, and modifications being delivered to ensure all students reach their full potential.

The final research question, "What are the characteristic administrative styles of elementary school administrators in their role as a leader of inclusion?" revealed a distinct leadership profile ingrained in empathy and compassion. The participants regarded accommodation of students with exceptionalities within inclusive placements as

the moral thing to do, and were also empathetic and compassionate towards staff, students, and parents. Interestingly, three participants demonstrated maternal or paternal characteristics when discussing their involvement with students with behavioural exceptionalities, and all indicated they had personal experience with a person with a disability outside of the school setting, which influenced their inclusive leadership practices. Next, the study's findings are discussed in relation to the literature.

Discussion

The participants' definition of inclusive learning environments shared common elements. They all espoused Porter's (2008) belief that school communities which embrace diversity, foster respect and belonging, and accept differences, diminish incidents involving harassment and bullying. Similarly, participants recognized they were key figures in fostering social acceptance and a feeling of belonging in the school community (Slee, 2006; Walther-Thomas et al., 2000; Zollers et al., 1999). They each acknowledged how an inclusive vision for their school had created a greater sense of community where all students felt as though they belong. This affirmation echoes a humanistic position in which students with exceptionalities and their peers who do not have exceptionalities gain immense social benefits from learning together in an inclusive environment, including an understanding of empathy, tolerance, advocacy, and embracement of difference (Farrell et al., 2007; Norwich & Kelly, 2004). It is evident that the environment and culture of the school setting has a direct impact on the acceptance of students with exceptionalities by all members of the organization (McDougall et al., 2004; Riehl, 2000).

Principals who have positive attitudes towards inclusion are more inclined to choose inclusive settings for special education placements (Evans et al., 1992; Hadjikakou & Manasonos, 2012; Horrocks et al., 2008; Praisner, 2003; Rude & Anderson, 1992). The participants said they were able to increase opportunities for students to be served in regular classrooms by offering a clear and concise vision to guide the organization towards their intended goals for inclusivity (Bennis & Nanus, 1985; Mitchell & Castle, 2005). Other benefits for students who do not have exceptionalities (or who have not yet been formally identified) include access to services and supports they might not otherwise have (Bunch & Valeo, 1997; Porter, 2008).

Another finding highlighted the relation between principals' inclusive vision and their ability to secure financial and human resources from their respective school boards and from other sources. Each participant commented on the challenges associated with administering an elementary school within a funding constraint reality. Okoroma and Robert-Okah (2007) note that effective management of human and material resources for goal achievement is a primary responsibility of the principal; the "absence of adequate resources and mounting pressure of demands" (p. 5) places pressure on school leaders. The participants explained how they allocate human resources (i.e., teaching and support staff) carefully when faced with funding constraints and how they gather additional resources for their school communities through networking to deliver inclusive programs for students with exceptionalities.

Owings and Kaplan (2004), building upon ideas posited in Adam Smith's *The Wealth of Nations* (1937), express that principals "become better advocates for educational funding when they can explain the relationship between education and the

community's standard of living" (p. 13). The participants in this study champion social justice and inclusivity by appealing to the Ministry/board, granting agents, or by fundraising to increase opportunities for all students. Interestingly, Graham and Spandagou (2011) describe how educators facing funding shortfalls in economically disadvantaged schools seem to have a more inclusive understanding of what "constitutes an 'average' child" (p. 227). This supports Claire's belief that "there is nobody that couldn't be identified in some way at our school of being at risk…whether it's the challenges of poverty or it's academic."

Three of the four principals revealed they had to manage some form of resistance to inclusion from the parent community. The participants' advocacy for inclusion evokes Theoharis's (2009) research which focused on administrators who put into place a social-justice paradigm and how they faced resistance from every aspect of their position: the job, themselves, their staff, the community, the school norms and structures, district administration, the bureaucracy, colleagues, larger society, state and federal regulations, and even principal preparation programs. The principals in the current study felt their position called on them to reassure parents that safety concerns are taken seriously and to discuss the protocols in place that ensure safety. They also indicated they possess skills to de-escalate sensitive confrontations. Like the administrators in Theoharis's research, the participants also faced physical and emotional pressures when supporting inclusive education, though perhaps less so because they are employed by school boards who support (full or partial) inclusive education and those in Theoharis's study were not.

Another finding revealed that each participant identified distinct beliefs about what her/his role as inclusion leader entails. The participants expressed that they: accept

that inclusion is who they are and that it affects and encompasses all of their day to day affairs, act as a resource for inclusion; advocate for differentiated instruction for all students; and lastly, are champions for their staff in their professional pursuits. This finding relates closely to Goleman et al.'s (2002) work which explains that emotionally intelligent leadership motivates, inspires, arouses passion and enthusiasm, and keeps people committed to the vision of the organization. Goleman et al. describe four of their six leadership traits (visionary, coaching, affiliative, and democratic) as traits which resonate and boost performance within the organization. Goleman et al. suggest that the most effective leaders act according to one or more leadership styles and skillfully maneuver their style depending on the circumstance. It is apparent that participants in this study represent leaders who embrace emotionally intelligent leadership qualities. They all indicated that they expect their teaching staff to adopt inclusionary practices and what they identified as this priority transfers to all members in the school's PLC (Mitchell & Castle, 2005).

The participants also stressed the vital role that the SERT has in supporting inclusive education. This supports Bunch's (1999) research that shows SERTs have "extensive knowledge of special needs, teaching strategies, [and know] how to locate materials and supplies, how to work with parents and others, and reporting methods" (p. 78). Although Bunch's work found the SERT may not always choose the most inclusive option for all students, the inclusive belief systems held by the participants and their SERTs in the present study were more aligned with recent literature that affirms SERTs have a more positive attitude towards inclusive education than their classroom teacher colleagues (McGhie-Richmond et al., 2013; Woolfson et al., 2007). As essential

members within schools' PLCs, the SERTs in this study received significant responsibility and were delegated authority to help meet the needs of all students. This collaboration suggests that shared leadership and power is necessary for creating and maintaining collaboration in schools (Crow, 1999); it empowers individuals and provides direction for selected individuals to follow through on their delegated responsibilities (Levine & Lezotte, 1999; Mitchell & Sackney, 2000).

In addition to principals' managerial roles, they must also create and maintain a collaborative culture within their school and be leading participants within that culture. This study highlighted how the participants functioned as "gatekeepers" for change and innovation, and how their philosophical stance on inclusivity ensured that inclusion of students with exceptionalities was a priority for school-improvement efforts (DuFour, 1991; Mitchell & Castle, 2005). The participants stated that informal communication regarding special education programming takes place on a regular basis and that striving for equity within school-based professional learning communities is paramount. The principals in this study held that it was very important to plan regular meetings or to have brief "ad hoc" conversations with all stakeholders involved. This allowed for all members to take time for mutual reflection and assess progress towards the intended goal of inclusion (DiPetta et al., 2010; Frederickson et al., 2007: Meijer, 2001). School-based team meetings and student update meetings were described as collaborative conversations in which the administrators could ensure that inclusion was taking place in each classroom. The objectives from the meetings described in this study reflect the three tenets of professional learning communities: a commitment to student learning, a culture

of collaboration and camaraderie, and a focus on results (DuFour, 2004); inclusive leaders within a PLC model insist on these same objectives for inclusive purposes.

This study revealed a distinct leadership profile ingrained in empathy and compassion. These administrators regard accommodating students with exceptionalities within inclusive placements as the moral thing to do and view inclusion as a socially just pedagogical framework (Frattura & Capper, 2007; Marshall & Oliva, 2010; Theoharis, 2009; Villa & Thousand, 1995). These inclusive leaders felt there was an essential need to model inclusion as there is a direct correlation between the principal's leadership style and school climate (Frattura & Capper, 2007; Fullan, 1999; Hoy & Miskel, 2001). When on the frontline, the participants displayed empathy and compassion when working with students with exceptionalities. As noted earlier, all four participants described personal experiences with a person with a disability outside of the school setting, and this undoubtedly influenced their inclusive leadership practices.

Implications for Practice

This research set out to document the role of the principal as an inclusion leader within a school PLC. Findings revealed that administrators set the inclusionary tone and direction of their school, and it is up to them to encourage and support all members of the PLC to facilitate inclusion for all students. It is clear that these exemplary school principals' inclusive practices can be viewed as a model for other administrators who strive to ensure that all students have access to inclusive education. This section will detail the implications for practice in education based on this study's findings.

This study revealed the specific humanistic and social constructivist interactions between principals and their staff and students in inclusive learning environment. This

warrants consideration for initial principal training programs that prepare future elementary school administrators. In Ontario, educators wishing to become principals must first qualify for and then complete the Principal's Qualification Program (PQP), a course consisting of two modules and a practicum. The course is administrated by Ontario's teaching regulation body, the Ontario College of Teachers. Recent changes were made to the PQP which now includes inclusive education in its curriculum. It would be beneficial for future administrators to have opportunities to interact with reputable leaders of inclusion who espouse humanistic and social constructivist qualities. This may include allowing principal candidates to observe inclusionary principals interacting with school staff and students, facilitating meetings, providing walk-abouts of their school sites, or participating in question and answer forums. The PQP might also encourage candidates to reflect upon their own qualities as humanistic leaders and to contemplate how supporting inclusive programs may intersect with their other leadership responsibilities, such as securing funding and fundraising.

Secondly, the exemplary qualities of inclusive leaders highlighted in this study might be incorporated into the screening process for future principals. After potential leaders have fulfilled their requirements for principal qualification training, they must be selected by a school board for the role of elementary school principal. The board has sole discretionary authority over the hiring of administrators and they commonly have additional requirements for leadership which are used to vet potential school leaders. Candidates who successfully become school leaders have the confidence of senior board staff and the elected board members to uphold the school board's reputation in society and to be models for all teachers and support staff. In this regard, school supervisory

officers and elected board members (trustees) could incorporate the study's findings into the applicant screening process to ensure all future school leaders are leaders of inclusion.

After the screening and selection process, school boards generally have a leadership program in place. This program might include a module on humanistic leadership which could explore positive experiences that potential leadership candidates have had in the past with students or other persons with exceptionalities. Boards could also accommodate sessions where leadership candidates interact and build a positive rapport with students with exceptionalities. Senior school administrators could schedule observation periods for leadership candidates within exemplary inclusive elementary schools, or conversely invite exemplary inclusionary leaders to participate in leadership program as guest speakers to encourage the next generation of school leaders.

Implications for Theory

Vygotsky (1978) emphasized the importance of the social contexts of learning and the premise that learning and knowledge of the world are simultaneously constructed (Palincsar & Herrenkhol, 2002). In the spirit of Vygotsky, the principal participants support the belief that learners construct knowledge through social interactions with each other. Principals who act as leaders of inclusion ensure that all students are included in the classroom, as well as in extracurricular activities. One of the participants reflected upon an experience in his past when a student who returned from an exclusive placement thrived in a full inclusive model:

> At that point I saw how much students benefited by being with their. …age-
> appropriate peers, doing what they are doing, and just experiencing the day at the

same time as everybody else. …You need to provide students with an opportunity to just be kids with other kids at the same time.

In keeping with social constructivism, inclusion leaders acknowledge the social benefits of learning in a full inclusion model. The principals in this study recognized that inclusion has many benefits for students who do not have exceptionalities, such as teaching them tolerance.

The study's findings can also be contextualized in terms of a humanistic theoretical orientation. The participants who excelled as leaders of inclusion fostered a sense of "belonging" in their school communities which appeals to Maslow's (1954) higher order needs. These administrators facilitated learning environments that embrace differences and promote respect and belonging. Contextualizing this study's findings in light of Maslow's view that motivation and initiative are related to a "hierarchy of needs," it is evident that for these principals, inclusion consciously transcends all duties to ensure an inclusive learning environment is in place. As noted earlier, these principals are empathetic and compassionate towards their staff, students, and parents, and they demonstrated nurturing qualities when discussing their involvement with students with behavioural exceptionalities. Based on this study's findings, it can be concluded that the four principal participants are humanistic leaders of inclusion while concurrently performing principals' key client-related, staff-related, managerial-related, and facility-related duties (Gupta, 2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993).

The participants demonstrated how they successfully performed their client-related duties when they engaged directly or indirectly with students, parents, and members of the community during day-to-day operations at their elementary school. It

was essential for these principals to promote their elementary school as an effective inclusive learning environment that creates a sense of community where all students feel as though they belong. When facing resistance to inclusive education practices from the parent community, these principals recognize they are champions of inclusive education and must put any debates of inclusive education in context and de-escalate sensitive confrontations.

The participants also showed their effective inclusionary leadership skills when performing staff-related duties such as interacting with teaching faculty, support staff, school board, and business personnel (Gupta, 2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993). For instance, when working within funding constraints, the participants carefully allocate human resources, valuing experience with students with exceptionalities as well as an empathetic personality when hiring new staff. The participants also described how they ensure inclusion takes place in each classroom by scheduling school-based team meetings and student update meetings. As described earlier, these meetings were also used to re-establish programming decisions as well as any interventions, accommodations, and modifications that ensure all students are challenged to meet their full potential.

The participants also explained how they handle managerial duties such as business related tasks (e.g., budgets, liaison) and policy-related responsibilities as inclusion leaders (Gupta, 2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993). Interestingly, the principals articulated that one of the tasks of inclusionary principals is to secure financial and human resources from their school board, as well as fundraise at the school level to deliver inclusive programs. As discussed above, the

participants overcame the challenges associated with limited resources to meet the needs of their students. They were able to solicit additional resources for their school communities through various channels by networking and successfully secured additional support to deliver their inclusive programs for students with exceptionalities.

Lastly, the participants showed how their inclusionary practices extended to facility-related duties such as overseeing building operations, planning, and maintenance (Gupta, 2009; Mertz & McNeely, 1999; Scoggins & Bishop, 1993). Principals who act as inclusion leaders are conscious of their schools' inclusive focus when preparing for renovations or designing newly constructed facilities. The participants emphasized that they "put their money where their mouth is" when budgeting for and executing capital projects to ensure that their facilities are fully accessible for all.

The participants effectively demonstrated each of these key responsibilities (client-related, staff-related, managerial-related, and facility-related duties) while acting as inclusion leaders for students with exceptionalities. These key responsibilities are embedded in the first four themes discussed in chapter 4 (leading an inclusive school: managerial duties and leadership style; inclusive collaborative cultures: leading and participating in an inclusive PLC; inclusionary cost analysis: securing board funding and allocating resources in an inclusive school; defining inclusive environments). Notably, what sets these administrators apart is that they demonstrated the principals' key responsibilities with a humanistic orientation that permeates their operating principles. This holistic role of being a leader of inclusion

was described in the fifth and final theme (humanistic qualities of effective inclusive leaders), and it encompassed all of the duties of these elementary school principals as they created and maintained inclusive learning environments. In light of this culminating conclusion, a conceptual model that displays how these inclusive principals operate as humanistic leaders of inclusion is presented in Figure 3.

The researcher chose the shape of a square-based pyramid to represent the holistic nature of inclusionary principals. Each of the four corners is labeled for the duties of an elementary school administrator. Each vertex on the square base rises to the apex of the pyramid where the humanistic qualities of compassion and empathy are showcased. This conceptual model demonstrates that being inclusive was not an added responsibility for the four principal participants, but rather it encompasses every part of their administrative role; it is simply who they are.

The researcher acknowledges a limitation with regard to the insufficiency in the discussion of this study's findings in terms of leadership literature. Analysis of this study's findings could have examined the role that power and organizational politics played in the influencing of the attitudes and actions of the participants when fulfilling their inclusive roles. Future work should call on the leadership literature and take a more critical stance.
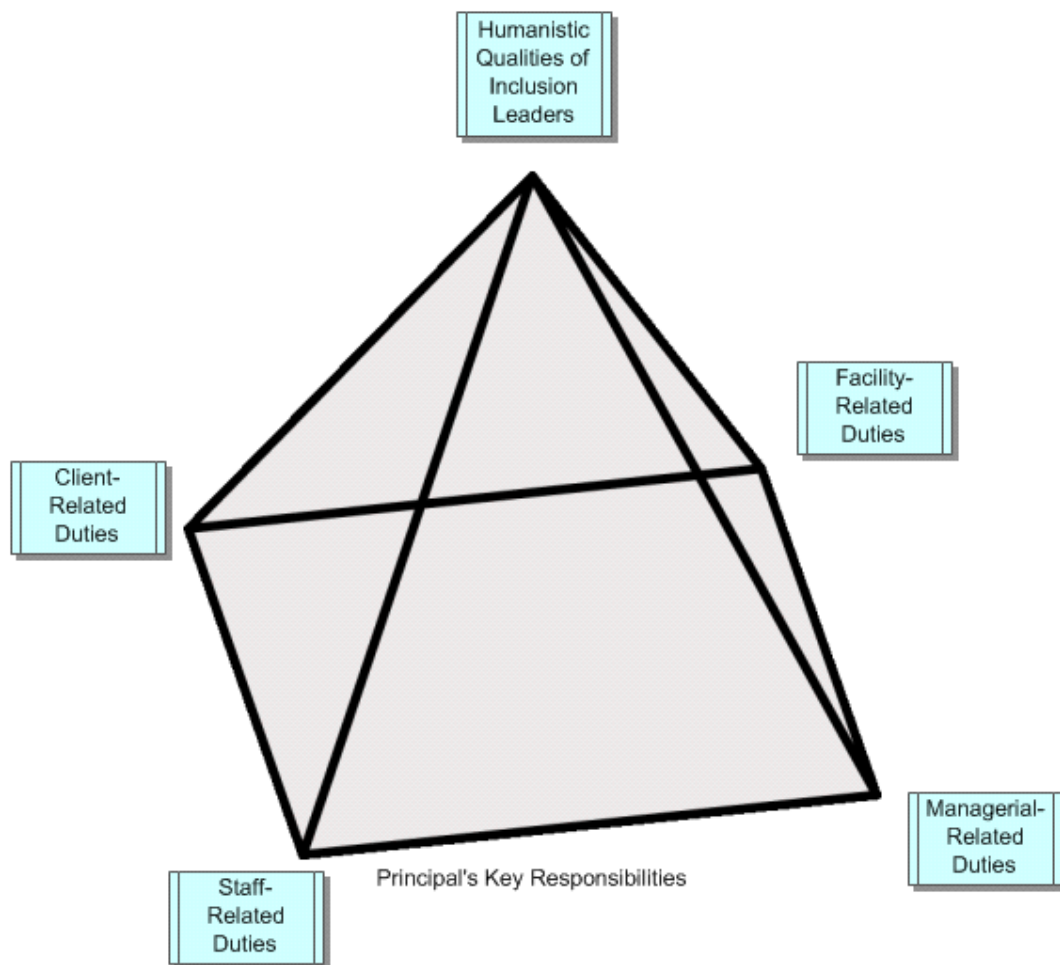
Figure 3. Humanistic qualities of inclusive leaders.

Implications for Future Research

This study identified common characteristics of four reputable inclusion leaders of elementary schools; now there is a need for future research to examine a larger or more diverse sample of principals. Future research might investigate inclusionary elementary school principals using a larger and more diverse sample. This study's sample included four administrators who were balanced on the basis of gender (two female and two male). One principal, Claire, worked in a public school board and three principals worked in two publically funded Catholic school boards. A future study might compare inclusion leaders in terms of their gender to investigate if there are any noticeable gender trends. Another focus might include a comparison of reputable leaders of inclusion who have varied experience levels.

The participants in this study had a range of experience between 4 and 20 years as elementary school principals. A future study could investigate the role of experience of inclusionary elementary school principals by comparing principals' attitudes and actions towards inclusion in relation to their experience as either new or veteran administrators. Lastly, a later study could compare a large and varied sample of principals from the public school board system, publicly funded Catholic school board system, and a privately funded school system to investigate any trends with principals who have been regarded as inclusion leaders in relation to their system.

A second research methodological consideration might be to lengthen the duration of data collection for the entire school year (September to June). The current study investigated four participants over the course of a few months. It might be beneficial to have weekly observations of each participant facilitating staff meetings or interacting

with staff and students doing day-to-day tasks. Each participant could be interviewed at the beginning, middle, and end of the research study to discuss personal growth and policy decision making rationale for the entire duration of the school year. This would provide prolonged engagement with each participant's experience.

Thirdly, future researchers might consider broadening the sample of the study's participants outside of the Ontario context to include other jurisdictions in Canada. Recent studies including Hadjikakou and Mnasonos's research (2012) of the attitudes of principals in Cyprus towards inclusion suggests that it is now timely for a survey of Canadian administrators. This study investigated four participants from three school boards in Southern Ontario. Since education policy is provincially driven in Canada, future researchers could sample from administrators who represent the various differences in terms of special education policy and delivery amongst the provinces and territories. This would necessitate a modification to such instruments as Praisner's (2003) Principal and Inclusion Survey which incorporated the Ontario special education nomenclature herein.

Lastly, a final consideration for future research might include a research design that includes other educational stakeholders' perspectives of inclusion in elementary school settings. The current study's design collected four elementary school principal participants' attitudes, reflections, and actions with regard to creating and maintaining an inclusive learning environment for all students. Future studies might value contributions from the perspectives of teachers, students, parents, supervisory officers for schools or for special education programming to complement the data collected from the principal participants.

Conclusion

Inclusion is essential to guarantee equity for all within society (Frattura & Capper, 2007; Theoharis, 2009). In public education, principals are tasked with the pivotal role of providing inclusive learning environments for all students. As a new educator and a burgeoning researcher, I consider myself extremely fortunate to have had this experience to research a problem that is so close to the heart of my personal philosophy of education. I am indebted to my four participants whom, through their contributions to my research, I can now consider my personal mentors. I am also proud to present their attitudes, beliefs, and actions as findings that other administrators may find beneficial for their own professional practice.

Through my interactions with the participants in this study, I feel that I have grown in all capacities—as a researcher, educator, and advocate for inclusive education. Paul's self-reflection of his role within his inclusive culture as a resource for staff, parents and students, as well as the fact that they are all are on a "journey together," reinforced the benefit of a team approach to delivering inclusion. Claire's savvy use of all tools available, including "schmoozing" to deliver her school's inclusive programs, was motivating as a potential school leader to seek resources all resources available. Sam's genuine display of parental empathy for her students emphasized the humanistic characteristics of compassion that all of the candidates displayed. Neil inspired me to ensure that I am able to tell all students' personal narrative with regard to their learning and to champion the needs of students with exceptionalities.

Reflecting on my past professional experiences which are now complemented by my research findings, it is apparent to me that modeling inclusion is an essential element of

social learning. As a classroom teacher, I now have confirmation that promoting and celebrating the differences of all students will benefit students with exceptionalities and their peers. I plan to take my research experiences into my future professional learning community to promote inclusion within my staff and continue to ensure that all students have access to education.

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Appendix A

Letter to Potential Expert Validators

March 24, 2009

Dear colleagues,

Thank you for taking the time to assist me in my research. I am interested in studying elementary school administrators in their role as a leader of inclusion for students with exceptionalities in their school's professional learning community.

Enclosed are the research instruments that I plan to use to collect data for my study (2 surveys and 2 sets of interview questions) as well as a validation chart. Please use this chart to write any comments with respect to your first impressions, ease of use, appropriateness to the role of administrator, redundancy of questions and if you feel there are any missing lines of questions/queries. I greatly appreciate your opinions and feedback.

Appreciatively,

James McInnis
Master of Education Candidate

Please Comment on the following:	Survey 1	Survey 2	Interview 1	Interview 2
Your **first impressions** of the research instruments.				
Their **Appropriateness** to the role of Administrator.				
The **Redundancy** of questioning.				
Are there any **missing lines of questions/queries**?				

Appendix B

Interview Protocol for Elementary School Principals

(October 2010 – after IEPs have been finalized)

<u>Pre-Interview script to be followed by the researcher conducting the interview</u>

Thank you for agreeing to participate in the research study, "Elementary School Principals as a Leader of Inclusion for Students With Exceptionalities." I am interested in your insights with respect to your experiences as an Administrator of an integrated elementary school.

I appreciate your willingness to share your experiences with me. Before I begin this interview, I would like to remind you of your right to withdraw from this study. As outlined in the information letter and consent form that you signed, your participation in this study is entirely voluntary. You may withdraw from the study or any part thereof at any time and for any reason. In addition, you may choose not to answer any question, or part thereof during this interview. Should you wish not to answer a question, or wish to end the interview, please tell me, and I will abide by your wishes without question.

As outlined in the information letter and consent form for this study, this interview will be audio-recorded for transcription and review. By signing a confidentiality agreement, the transcriber has agreed to respect your privacy and to keep all information about this study and your response to all questions during this interview strictly confidential. Following completion for the transcription process, you will be provided with a copy of your interview transcript for review and verification of accuracy.

Additionally, to protect your privacy and ensure that the information you provide is confidential, you will be provided with a pseudonym that will be used in collecting, analyzing and reporting information during this research project. Throughout the interview, I will refer to you as (insert participants' pseudonym), rather than by your actual name. Do you have any questions or concerns? May I start the audio-tape?

1. Tell me a bit about your background as a teacher; as an administrator.

2. Describe your school. Tell me about the school population; demographics; staff.

3. Describe the characteristics that you believe define an "inclusive school?"

4. How would you describe the relationship among your professional learning community?

5. Is inclusion for students with exceptionalities a priority for your teaching staff?

6. Describe your responsibilities as a leader of inclusion within your school's learning community?

7. Describe some of the challenges that you face as an inclusion leader in your school's professional learning community?

8. How important do you feel the role of an inclusion leader is compared to the other responsibilities of being an elementary school administrator?

9. Describe your approach to ensure your teaching faculty are upholding the modifications and accommodations documented in students' IEPs.

10. Describe the barriers or limitations that hinder the creation or maintenance of an inclusive learning environment in your school?

11. Describe the roles of your teaching staff when it comes to creating and maintaining an inclusive learning environment for all students with exceptionalities?

12. Do you anticipate any future professional development needs with respect to educating students with disabilities for you or your teachers?

13. Describe the experiences of the Educational Assistants in your school. What is their role in ensuring inclusion is ubiquitous in the school community?

14. Describe your thoughts of the influence of the Special Education Resource Teacher's role among the school's professional learning community?

15. Describe the external supports and paraprofessionals that are necessary (available) for you and your teachers to meet the needs for all students with exceptionalities in your school community.

16. Describe any current goals (individual/school/board) that pertain to improving conditions for pupils with exceptionalities in this calendar year? How do you envision fulfilling these goals? What inspired you to frame these goals?

17. What factors contributed to the implementation of an inclusive education philosophy for your school?

THANK YOU FOR PARTICIPATING IN THIS INTERVIEW!

Appendix C

Interview Protocol for Elementary School Principals

(January 2011 – after First Term Reports have been distributed to parents)

<u>Pre-Interview script to be followed by the researcher conducting the interview</u>

Thank you for agreeing to participate in the research study, "Elementary School Principals as a Leader of Inclusion for Students With Exceptionalities." I am interested in your insights with respect to your experiences as an Administrator of an integrated elementary school.

I appreciate your willingness to share your experiences with me. Before I begin this interview, I would like to remind you of your right to withdraw from this study. As outlined in the information letter and consent form that you signed, your participation in this study is entirely voluntary. You may withdraw from the study or any part thereof at any time and for any reason. In addition, you may choose not to answer any question, or part thereof during this interview. Should you wish not to answer a question, or wish to end the interview, please tell me, and I will abide by your wishes without question.

As outlined in the information letter and consent form for this study, this interview will be audio-recorded for transcription and review. By signing a confidentiality agreement, the transcriber has agreed to respect your privacy and to keep all information about this study and your response to all questions during this interview strictly confidential. Following completion for the transcription process, you will be provided with a copy of your interview transcript for review and verification of accuracy.

Additionally, to protect your privacy and ensure that the information you provide is confidential, you will be provided with a pseudonym that will be used in collecting, analyzing and reporting information during this research project. Throughout the interview, I will refer to you as (insert participants' pseudonym), rather than by your actual name. Do you have any questions or concerns? May I start the audio-tape?

1. Have there been any changes with regard to staff (including Educational Assistants, Special Education Resource Teachers, and Classroom Teachers); students with exceptionalities since we last spoke?

2. You and your teaching staff just concluded the first reporting process. Describe the successes of meeting the needs of students with exceptionalities in this first term. What worked well? What do you feel can be improved?

3. Have you modified any of your inclusive practices in this calendar year? What promoted this?

4. During our first interview you described personal goals with respect to special education and inclusive programming for your staff and students. Describe how these goals have evolved over the course of the term.

5. Comment on the support that has been available to assist you and your staff implement inclusive practices within your school community over the past term?

6   In your experiences, where is the emphasis for inclusive education coming from; the ministry, the board level, school level, the parents, the community at large? Who is advocating for these practices? Is everyone in agreement, what are the drawbacks?

7   How have you informed parents and guardians of the inclusive philosophy of your school?
    Have you ever experienced any cases of opposition or challenges from parents when implementing the inclusive program? If there were, what were your steps to manage these situations?

8   Describe the benefits you believe an inclusive learning environment provides students with exceptionalities? What are the benefits for students who do not have exceptionalities?

9   Describe how exceptional students have integrated socially with their peers.

10 Describe what responsibilities you feel that an administrator has or needs to be a successful leader of inclusion? What are the challenges to meeting this role?

11 How do your teachers ensure inclusion is ubiquitous in the school environment? How do you support your teachers' effort in this?

THANK YOU FOR PARTICIPATING IN THIS INTERVIEW!

Appendix D

Observation Template for Staff Meeting

Setting:
Individual Observed:
Observation #: (first observation, second, etc.)
Observer involvement :

Date/Time:
Place :
Duration of Observation (indicate start/end times):

Descriptive Notes	Reflective Notes
Detailed, chronological notes about what the observer sees, hears; what occurred; the physical setting	Concurrent notes about the observer's personal reactions, experiences)

Appendix E

Principals and Inclusion Survey

The purpose of this survey is to determine the opinions of elementary principals toward the inclusion movement and to gather information about the types of training and experience that principals have. There are no right or wrong answers so please address the questions to the best of your knowledge and provide us with what **you believe**.

****

SECTION I- Demographic Information

The following information will be only be used to describe the population being studied.

1. Approximate number of students in your building:
   ☐ 0-250   ☐ 251-500   ☐ 501-750   ☐ 751-1000   ☐ 1000 or more

2. Average class size for all grades:
   ☐ 0-19   ☐ 20-24   ☐ 25-29   ☐ 30-34   ☐ 35 or more

3. Approximate percentage of students with IEPs in your building:
   ☐ 0-5%   ☐ 6-10%   ☐ 11-15%   ☐ 16-20%   ☐ 21% or more

4. Approximate number of students with IEPs in your building that are included in regular education classrooms for at least 75% of their school day:
   ☐ 0-20%   ☐ 21-40%   ☐ 41-60%   ☐ 61-80%   ☐ 81-100%

SECTION II- Training and Experience

1. Your age:
   ☐ 20-30   ☐ 31-40   ☐ 41-50   ☐ 51-60   ☐ 61 or more

2. Gender: ☐ Male   ☐ Female

3. Years of full-time regular education teaching experience:
   ☐ 0   ☐ 1-6   ☐ 7-12   ☐ 13-18   ☐ 19 or more

4. Years of full-time special education teaching experience:
   ☐ 0   ☐ 1-6   ☐ 7-12   ☐ 13-18   ☐ 19 or more

5. Years as an elementary school principal:
   ☐ 0-5   ☐ 6-10   ☐ 11-15   ☐ 16-20   ☐ 21 or more

6. Years of experience as the principal at your current elementary school:
   ☐ 0-5   ☐ 6-10   ☐ 11-15   ☐ 16-20   ☐ 21 or more

7. Approximate number of special education **courses** in your formal training:
   ☐ 0   ☐ 1-9   ☐ 10-15   ☐ 16-21   ☐ 22 or more

8. Approximate number of inservice training **workshops** in inclusive practices (in the last 10 years):
   ☐ 0   ☐ 1-8   ☐ 9-16   ☐ 17-24   ☐ 25 or more

9. Mark the areas below that were included in your formal administration training such as courses, workshops, and/or significant portions of courses (**10% of content or more**).
   - ☐ Characteristics of students with disabilities
   - ☐ Behavior management class for working with students with disabilities
   - ☐ Academic programming for students with disabilities
   - ☐ Special education law
   - ☐ Crisis intervention
   - ☐ Life skills training for students with disabilities
   - ☐ Teambuilding
   - ☐ Interagency cooperation
   - ☐ Family intervention training
   - ☐ Supporting and training teachers to handle inclusion
   - ☐ Change process
   - ☐ Eliciting parent and community support for inclusion
   - ☐ Fostering teacher collaboration
   - ☐ Field based experiences with actual inclusion activities

10. Do you have additional qualifications in Special Education?   ☐ No   ☐ Yes

11. Does your school have a specific plan to deal with crisis
    involving students with special needs?   ☐ No   ☐ Yes

12. Do you have personal experience with (an) individual(s) with a
    disability outside the school setting, i.e. family member, friend, etc.?   ☐ No   ☐ Yes
    If yes, please indicate relationship to you.

    | ☐ Self | ☐ Immediate family member | ☐ Extended family member |
    | ☐ Friend | ☐ Neighbor | ☐ Other: _____ |

13. Does your school board's mission statement include a **vision** for
    the inclusion of students with disabilities?   ☐ No   ☐ Yes

14. In general, what has your experience been with the following types of students in the school setting. Mark one level of experience for each disability category.

Disability Type	Negative Experience	Somewhat Negative Experience	No Experience	Somewhat Positive Experience	Positive Experience
Behaviour	☐	☐	☐	☐	☐
Autism	☐	☐	☐	☐	☐
Deaf and Hard-of-Hearing	☐	☐	☐	☐	☐
Language Impairment	☐	☐	☐	☐	☐
Speech Impairment	☐	☐	☐	☐	☐
Learning Disability	☐	☐	☐	☐	☐
Giftedness	☐	☐	☐	☐	☐
Mild Intellectual Disability	☐	☐	☐	☐	☐
Developmental Disability	☐	☐	☐	☐	☐
Physical Disability	☐	☐	☐	☐	☐
Blind and Low Vision	☐	☐	☐	☐	☐
Multiple	☐	☐	☐	☐	☐

SECTION III- Attitudes Toward Inclusion of Students with Special Needs

Please mark your response to each item using the following scale:

	Strongly Agree	Agree	Uncertain	Disagree	Strongly Disagree
1. Only teachers with extensive special education experience can be expected to deal with students with disabilities in a school setting.	☐	☐	☐	☐	☐
2. Schools with both students with severe and profound disabilities and students without disabilities enhance the learning experiences of students with disabilities.	☐	☐	☐	☐	☐
3. Students with disabilities are too impaired to benefit from the activities of a regular school.	☐	☐	☐	☐	☐
4. An effective regular classroom educator can do a lot to assist a student with a disability.	☐	☐	☐	☐	☐
5. In general, students with disabilities should be placed in special classes/schools specifically designed for them.	☐	☐	☐	☐	☐
6. Students without disabilities can profit from contact with students with disabilities.	☐	☐	☐	☐	☐
7. Regular education should be adapted to meet the needs of all students including students with disabilities.	☐	☐	☐	☐	☐
8. It is unfair to ask/expect regular teachers to teach students with disabilities.	☐	☐	☐	☐	☐
9. No discretionary financial resources should be allocated for the integration of students with disabilities.	☐	☐	☐	☐	☐
10. It should be policy and/or law that students with disabilities are integrated into regular educational programs and activities.	☐	☐	☐	☐	☐

SECTION IV- Most Appropriate Placements for Students with Disabilities
Although individual characteristics would need to be considered, please mark the placement that, in general, **you believe** is most appropriate for students with the following disabilities:

Behaviour
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Giftedness
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Autism
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Mild Intellectual Disability
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Deaf and Hard-of-Hearing
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Developmental Disability
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Language impairment
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Physical Disability
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Speech impairment
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Blind and Low Vision
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Learning Disability
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Multiple
- ☐ Special education services outside regular school
- ☐ Special class for most or all of the school day
- ☐ Part-time special education class
- ☐ Regular classroom instruction and resource room
- ☐ Regular classroom instruction for most of day
- ☐ Full-time regular education with support

Thank you for taking the time to answer all of the questions on this survey. We appreciate your assistance with this study!

Appendix F

Principals and Inclusion Survey Results—Section III: Attitudes Toward Inclusion of

Students With Special Needs

	Paul	Claire	Sam	Neil
1. Only teachers with extensive special education experience can be expected to deal with students with disabilities in a school setting.	Disagree	Strongly disagree	Strongly disagree	Strongly disagree
2. Schools with both students with severe and profound disabilities and students without disabilities enhance the learning experiences of students with disabilities.	Agree	Strongly agree	Strongly agree	Strongly agree
3. Students with disabilities are too impaired to benefit from the activities of a regular school.	Strongly disagree	Strongly disagree	Strongly disagree	Strongly disagree
4. An effective regular classroom educator can do a lot to assist a student with a disability.	Strongly agree	Strongly agree	Strongly agree	Strongly agree
5. In general, students with disabilities should be placed in special classes/schools specifically designed for them.	Strongly disagree	Strongly disagree	Strongly disagree	Strongly disagree
6. Students without disabilities can profit from contact with students with disabilities.	Agree	Strongly agree	Strongly agree	Strongly agree
7. Regular education should be adapted to meet the needs of all students including students with disabilities.	Strongly agree	Agree	Strongly agree	Strongly agree
8. It is unfair to ask/expect regular teachers to teach students with disabilities.	Strongly disagree	Disagree	Strongly disagree	Strongly disagree
9. No discretionary financial resources should be allocated for the integration of students with disabilities.	Disagree	Strongly disagree	Strongly disagree	Strongly disagree
10. It should be policy and/or law that students with disabilities are integrated into regular educational programs and activities.	Agree	"?"	Uncertain	Strongly agree

Appendix G

Principals and Inclusion Survey Results—Section IV: Most Appropriate Placement

for Students With Disabilities

	Paul	Claire	Sam	Neil
Behaviour	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Autism	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Deaf and hard-of-hearing	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Language impairment	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Speech impairment	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Learning disability	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Giftedness	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Mild intellectual disability	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Developmental disability	Full-time regular education with support	"Depends on severity…minimal integration at least"	Full-time regular education with support	Full-time regular education with support
Physical disability	Regular classroom instruction for most of the day	Special class for most or all of the school day	Full-time regular education with support	Full-time regular education with support

Appendix H

Participant Data Collection Schedule

Paul

The researcher met with Paul on three occasions between October 2010 and February 2011. At the first meeting Paul was interviewed (using Appendix B) and at this time he provided the researcher with his completed Principals and Inclusion Survey. During the next visit, in December 2010, Paul facilitated a walk-about throughout his school with the researcher and also participated in a school based team meeting. Lastly, in February 2011, Paul was interviewed (using Appendix C) and participated in a second school-based team meeting. Both school-based team meetings were attended by the SERT, who chaired the meeting, classroom teaching staff, and Paul.

Claire

The researcher met with Claire on three occasions between November 2010 and April 2011. At the first meeting, Claire was interviewed (using Appendix B) and at this time she submitted her completed Principals and Inclusion Survey. At the next visit in March 2010, she was observed while facilitating two Student Update Meetings. In these meetings which were presided over by Claire, she discussed learning progress and classroom support with two individual groups of grade teaching partners. The meetings were attended by the classroom teachers, as well as the SERT, the English as a Second Language teacher, the vice-principal, and Claire. At the final visit in April 2011, Claire was interviewed (using Appendix C) and facilitated a walk-about with the researcher.

Sam

The researcher met with Sam on three occasions between November 2010 and May 2011. At the first meeting, Sam was interviewed (using Appendix B) and at the meeting she verbally completed the Principals and Inclusion Survey in view of the researcher who recorded her answers. At the next visit in April 2011, she was observed while participating in a school-based team meeting with her teaching staff, SERT, and vice-principal. This meeting was also attended by an external social worker from the community. At the final visit in May 2011, Sam was interviewed (using Appendix C), facilitated a walk-about with the researcher, and participated in a second school-based team meeting. Similar at Paul's school, the school-based team meetings were chaired by the SERT and were attended by classroom teachers and administration.

Neil

The researcher met with Sam on four occasions between May and June 2011. At the first meeting, Neil was interviewed in May 2011 (using Appendix B) and provided the researcher with a completed Principal and Inclusion Survey. At the next visit, in late-May 2011, he was observed while facilitating a staff meeting after school. The meeting was attended by the teaching and support staff, including the SERT. The following day, Neil was observed participating in a school-based team meeting chaired by the SERT and attended by several classroom teachers. At the final visit in June 2011, Neil was interviewed (using Appendix C) and facilitated a walk-about with the researcher led by the SERT. He did not accompany the researcher on the walk-about.

Appendix I

Principals and Inclusion Survey Description

Section I gathers information with respect to the demographics of the participant's school population. The four questions in this section collect information based on the following questions: approximate numbers of students in your building; average class size for all grades; approximate percentage of students with IEPs in your building; and approximate number of students with IEPs in your building that are included in regular education classrooms for at least 75% of their school day.

Section II gathers information with regard to the elementary school principal participants' training and experience as teachers and administrators. This section is composed of 14 questions. Questions 1 to 8 use a 5-point Likert scale design for data on the participant's age, gender, years of full-time regular education teaching experience, years of full-time special education teaching experience, years as an elementary school principal, years of experience as the principal at your current elementary school, approximate number of special education courses in their formal training, and approximate number of in-service training workshops in inclusive practices (in the last 10 years). Question 9 asks the participant to indicate all formal administration training such as courses, workshops and/or significant portions of courses. The participants list all relevant courses from a selection of 14 topics. Questions 10 to 13 use a 2-point scale for the following "yes" or "no" questions: Do you have additional qualification in special education? Does your school have a specific plan to deal with crisis involving students with special needs? Do you have personal experiences with (an) individual(s) with a disability outside the school setting (i.e., family member, friend, etc)? Does your school

board's mission statement include a vision for the inclusion of students with disabilities? Question 14 seeks to describe the participants' past experience with various types of students with exceptionalities in the school setting. This section was modified from the original survey by incorporating the 12 exceptionalities used in education in Ontario. The participants indicate their selection from either "negative experience," "somewhat negative experience," "no experience," "somewhat positive experience," or "positive experience."

Section III uses a 5-point Likert Scale with 10 questions with regard to participants' attitudes toward the inclusion of students with special needs. The participants select "strongly agree," "agree," "uncertain," "disagree," or "strongly disagree." The 10 questions are evenly distributed in terms of indicating positive or negative attitudes throughout the section. Section IV documents each participant's choice for the most appropriate placement for students within the 12 exceptionality groups in Ontario. The participants could choose either "special education services outside regular school," "special class for most or all of the school day," "part-time special education class," "regular classroom instruction and resource room," "regular classroom instruction for most of day," or "full-time regular education with support." The survey also drew connections between attitudes towards inclusion and placement perception, personal experience with an individual with a disability outside the school setting, and professional development.