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**THE SOCIAL-HISTORICAL CONTEXT
OF SPECIAL EDUCATION AND MAINSTREAMING
IN THE UNITED STATES
FROM INDEPENDENCE TO 1990**

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December 1992

A Thesis submitted to the
Faculty of Graduate Studies and Research
in partial fulfillment of the requirements of the degree of
Doctor of Philosophy

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Short Title of Thesis

Special education and mainstreaming in the the US social-historical context

A. Karagiannis

ABSTRACT

This investigation explored special education and mainstreaming in the social-historical context of U.S. general formal public education and society from the American Revolution to 1990. Its main purpose was to examine the obstacles to and prospects of 'purposeful' mainstreaming in this wider context. First, special education was placed in the context of general education and society. Second, the objectives of general education were viewed historically to examine the influence of evolving societal conditions on special education. Third, the outcomes of PL 94-142 (Education for All Handicapped Children Act) from its passage to the late 1980s were explored in conjunction with the various models and practices of mainstreaming. Fourth, the meaning of the 1980s' 'excellence' reforms were scrutinized. It was found that: (1) the concept of 'society as primarily an economic entity' has had a decisive influence on the objectives of U.S. formal education and special education; (2) special education has functioned mainly as a means of educational amelioration and social control; (3) there have been three major waves of reform in special education arrangements in U.S. history - in the first two waves the element of social control outlasted the element of educational remediation; (4) the latest wave of special education reform, led primarily by the federal government and corporate business and targeting disadvantaged students and their families, has commenced since the 1960s; and (5) the principal mode of reform for the latest wave appears to be 'interagency collaboration' which has inherent elements of educational improvement and social control. Implications of these findings for 'purposeful' mainstreaming are discussed. Based on the suggestion that the obstacles to mainstreaming be situated in the wider social-historical context of the U.S. society, several recommendations are given for strategic planning and more meaningful reform.

Résumé

Cette étude examine l'éducation de l'enfant en difficulté et son intégration dans le contexte socio-historique de l'éducation publique et de la société depuis la Révolution Américaine jusqu'en 1990. L'objectif principal est d'examiner les obstacles et les perspectives d'une intégration 'intentionnelle' dans un contexte aussi élargi. Premièrement, nous avons situé l'éducation de l'enfant en difficulté dans un contexte d'éducation en général et dans la société. Deuxièmement, les objectifs de l'éducation publique furent considérés du point de vue historique pour étudier l'influence de l'évolution de la société sur l'éducation de l'enfant en difficulté. Troisièmement, les résultats du PL 94-142, de son adoption jusqu'à la fin des années 80, furent analysés en conjonction avec les divers modèles et pratiques utilisés lors de l'intégration. Quatrièmement, le sens du terme 'excellence' utilisé lors des réformes de 1980 fut examiné minutieusement. Nous avons trouvé que: 1) le concept de 'la société en tant qu'entité économique première' a eu une influence décisive sur les objectifs de l'éducation américaine, publique et spécialisée; 2) l'éducation de l'enfant en difficulté a été principalement instaurée afin d'améliorer le système d'éducation et aussi d'aider au contrôle de la société; 3) qu'il y a eu trois courants majeurs de réforme dans les dispositions de l'histoire américaine sur l'éducation de l'enfant en difficulté - dans les deux premiers courants, l'élément du contrôle de la société a survécu à l'élément de remédiation de l'éducation; 4) le dernier courant dans la réforme de l'éducation pour l'enfant en difficulté, conduite par le gouvernement fédéral et les corporations et visant les étudiants en difficulté ainsi que leurs familles, a commencé depuis les années 1960; et 5) le principal modèle

de réforme du dernier courant porte sur la collaboration inter-agences, laquelle possède des éléments inhérents à la progression de l'éducation et du contrôle social. Les résultats et conséquences de cette recherche pour une intégration 'intentionnelle' sont analysés et discutés. Se basant sur la suggestion que les obstacles à la mise en marche de l'intégration se situent dans le vague contexte socio-historique américain, plusieurs recommandations sont offertes pour une planification stratégique et une réforme plus significative.

PREFACE

Based on an analysis of special education in the social-historical context of the United States, this investigation has concluded that there have been three major waves of special education reform so far. All three waves have coincided with major economic, social, and political transitions in U.S. history. As part of these transitions, public education has been the target of reform to adapt to the evolving realities of the day. Special education has been factored into these reforms as a social institution for social-educational improvement and social control. In the first two waves of special education reform the intent of social control outlasted the intent of social-educational remediation.

The concept of society as primarily an economic entity has been inextricably linked in all three waves. It has largely driven the objectives of U.S. public education which in turn have influenced the philosophy and practice of special education toward exclusion of students with disabilities from the mainstream of education. The 1980s' education reforms have further entrenched economic priorities in American public education and have increased the authority of government and corporate business in educational matters.

The latest wave of special education reform commenced in the 1960s and is currently underway. The primary service-delivery model of this latest wave is interagency collaboration targeting disadvantaged (or at risk) students and their families, estimated to be 30% to 40% of the whole student population. Students with disabilities are considered to be a constituent group of the disadvantaged population. Initial indications point to schools as the 'preferred' site for interagency collaboration. Government and corporate business seem to be the two main social groups whose intent in interagency collaboration is social control, while educators and

mainstreaming advocates have an intent of social and educational amelioration. Both government and corporate business and mainstreaming advocates have espoused similar processes of collaboration to achieve conflicting aims.

According to evolving patterns, interagency collaboration will function in the mainstream of education. This poses the paradox that both social controllers and mainstreaming advocates are currently in favor of mainstreamed education for all students. Judging on historical precedent and some initial indications, however, it is likely that the intent of social control may predominate over the intent of social and educational improvement. It is argued that special education and mainstreaming have to be examined in the wider backdrop of educational and social trends to promote strategic planning and meaningful reform.

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CHAPTER 1

Introduction

Rationale of The Study

There has been a substantial amount of empirical research examining the mainstreaming of students with disabilities into regular schools (see Lipsky & Gartner, 1989a; Stainback & Stainback, 1990c; Stainback, Stainback, & Forest, 1989). Most of these studies were preoccupied with analyses of the successes and failures of the mainstreaming movement at the micro level, that is at the school level. There has been little systematic effort to link analyses at the school level with relevant knowledge at the macro level, that is at the social-historical level (Karagiannis & Cartwright, 1990). The effort so far has relied on references that more or less follow this line of argument: that until 1800 most people with disabilities were viewed as ineducable; that during the nineteenth and twentieth centuries they were segregated into institutions; and that today "the goal of universal mainstream education is potentially within our grasp" (Stainback, Stainback, & Bunch, 1989b, p. 5). This fleeting reference to the way special education has progressively evolved from the 'dark ages' of segregation to the progressive era of mainstreaming appears to be inadequate. An understanding of how special education and mainstreaming are influenced by the context and development of American formal education and society is pivotal because they do not function in vacuum. They have to be placed within the larger context. Aristotle had said of the power of history to provide insight:

He who...considers things in their first growth and origin, whether a state or anything else, will obtain the clearest view of them (Cited in Pickett, 1969, p. vii).

Similar views have been expressed more recently by Rothman (1971, p. xx) and Hawes (1991, p. ix) who have studied the establishment and evolution of institutions for various special populations and children in the United States over the last two to three hundred years.

The need for placement of special education and general formal education in the wider social context becomes more evident in the astounding proportion of the American population who are involved either directly or indirectly in education. The U.S. Department of Education, National Center for Education Statistics (1990), calculated this proportion in 1989 at 25% of the total U.S. population:

In the fall of 1989, about 59.2 million persons were enrolled in American schools and colleges....About 3.5 million were employed as elementary and secondary school teachers and as college instructors. Other professional, administrative, and support staff of educational institutions numbered 3.8 million. Thus more than 66 million Americans were involved, directly or indirectly, in providing or receiving formal education....[or] more than 1 out of every 4 persons (p. 1).

The scope of American education is indeed all-encompassing.

Carrier (1986) has particularly suggested that a more holistic framework is needed to gear relevant social science research. This framework would link special education to general education and the social context of American society. He has suggested that the marginalization of special education in social theory has been misguided since its growth over the last few decades has been 'explosive' (p. 281). This growth implies that special education no longer occupies a **marginal** position in American formal education, if it ever did.

Studies have indicated that despite the genuine wishes of many special educators to help students with disabilities, the general educational context quite often thwarts their efforts (e.g. Milofsky, 1974, 1976, 1989; Weatherly & Lipsky, 1977). The 1980s' educational reforms with their focus on 'excellence' and 'quality' (National Commission on Excellence in Education, 1983)

appear to have been the latest example. Most of the debate surrounding these reforms had left special education on the sidelines in the early 1980s but more recently there has been more attention to disadvantaged or 'at risk' students (Lipsky & Gartner, 1989b). The earlier emphasis of the reforms on higher academic standards and their association to national economic growth has been viewed as a sign that "special education students are not considered worthy or needy of educational attention" (Sapon-Shevin, 1987, p. 305). Consequently, there is a need to examine the meaning of the 'excellence' reforms in connection to mainstreaming and special education. So far, it appears that these reform have worked to thwart mainstreaming efforts.

An indication is the dissatisfaction of mainstreaming advocates with the outcomes of *The Education for All Handicapped Children Act* (PL 94-142), passed in 1975, to provide children with disabilities appropriate education in the least restrictive educational environment. The general consensus seems to be that this law has failed to change the way things are done in special education (Asch, 1989; Lipsky & Gartner, 1987, 1989b; National Coalition of Advocates for Students, 1985; Stainback & Stainback, 1984; L. J. Walker, 1987). Public Law 94-142 and its consequences, therefore, have also to be examined in the social context of general education and American society.

This perceived failure of PL 94-142 has prompted the advocates of what has come to be known as 'purposeful' or 'programmatic' mainstreaming to urge a 'merger' between regular and special education (Gartner & Lipsky, 1987; Stainback & Stainback, 1984; Stainback, Stainback, & Bunch, 1989a). A preliminary review of the relevant literature indicates that this unification may be a necessary precondition for the success of 'purposeful' mainstreaming (Lipsky & Gartner, 1989a; Stainback & Stainback, 1990c; Stainback, Stainback, & Forest, 1989).

Most of the analysis of special education by 'purposeful' mainstreaming advocates appears to have occurred at the humanistic, legal, attitudinal, labeling and interactionist theory, or school system levels (see Lipsky & Gartner, 1989a; Stainback & Stainback, 1990c; Stainback, Stainback, & Forest, 1989). Carrier (1986) has criticized the interactionist and labeling theory perspectives as focusing on surface processes and thus as not being able to conceive an adequate framework to understand phenomena and propose sufficient reforms. His criticism applies equally to the rest of these analysis levels:

[The social forces] and the social and historical framework that identifies them must be kept in mind by those who want to answer fundamental questions of why special education exists and how it can be changed and expected to change (p. 306).

If fundamental change of the current special education system in the U.S. is the goal of mainstreaming reform, then the issue of *why* special education exists is paramount.

Purpose and Objectives of the Study

The purpose of this investigation is to conduct an exploratory study examining the obstacles to and prospects of 'purposeful' mainstreaming in the social-historical context of the United States. This study will have four components. First, special education will be situated in the context of general formal U.S. education and society (note that only primary and secondary schooling will be considered). Sociological literature indicates that the objectives and functions of formal education and the manner in which they are influenced by the conditions in society (e.g. Bowles & Gintis, 1976; M. Cole, 1988; Spring, 1972, 1976) would be a prime target of this component. Second, these objectives and functions will be viewed historically to see how

evolving societal conditions and priorities have influenced special education. The historical component is important to avoid the likelihood of what Berger and Luckmann (1966) have termed, in *The Social Construction of Reality*, 'reification': the tendency of humans, with the passage of time, to perceive their assumptions and practices as the only possibility of structuring reality, despite the fact that these assumptions and practices originally were socially constructed. Third, there will be a probe of the results of PL 94-142. Emphasis will be placed on the patterns of educational placements of students with disabilities and on positive and negative effects of the law. The various models and practices of mainstreaming will also be examined in conjunction with PL 94-142. Fourth, the meaning of the 1980s' 'excellence' educational reforms will be scrutinized.

It is thought that a social-historical context will provide opportunities for theory-building and for taking into account a wider set of social parameters into strategic planning to enhance 'purposeful' mainstreaming. Since this is an initial attempt to link mainstreaming to wider social-historical processes, the literature utilized in each of the components will not be exhaustive. The emphasis of the study is on detecting trends rather than focusing on detailed description. The latter will be a concern of future programmatic research.

The following questions summarize the purpose and objectives of the present study:

Question 1: How does special education fit into the general context of American public formal education and society over the last two hundred years?

Question 2: How have the objectives of American public formal education influenced the development of special education over the last two hundred years?

Question 3: What have been the outcomes of PL 94-142 for students with disabilities until 1990?

Question 4: What is the meaning of the 1980s' 'excellence' reforms and some of its preliminary outcomes?

Question 5: What are the obstacles to and prospects for 'purposeful' mainstreaming in light of the above?

The major premises of the study are as follows: (1) a 'here and now' approach to the obstacles and problems facing mainstreaming is not adequate; (2) a social-historical approach to special education and mainstreaming has the potential to reveal a wealth of information for theory-building and practice; (3) the methodology of the study should be such as neither to restrict nor obscure the achievement of the study objectives (4) the emphasis of the study is on discerning trends rather than detailing review and depiction of the study components; (5) the information will be critically analyzed; (6) the conclusions of the study will provide an initial framework linking special education and mainstreaming to social processes so as to assess barriers to 'purposeful' mainstreaming; and (7) this framework will provide strategic planning opportunities to implement reform that will enhance 'purposeful' mainstreaming for the benefit of all students, including students with disabilities.

Methodology, Definition of Terms, and Organization

The examination of the historical context has been divided into two periods: (1) the period between the American Revolution to the American Civil War dating from 1783 (when the peace

treaty with Great Britain was signed in Paris) to 1861, and (2) the period between the end of the Civil War in 1865 to 1990.

There is extensive use of quotations throughout this document. Note that many quotations are used as data for the purposes of qualitative analysis.

The major conclusions of Chapters 2 to 7 are summarized at the end of each chapter in the 'Emerging Themes' section. These conclusions are further synthesized in Chapters 8 and 9. Although some documentation (referencing) is integrated into Chapters 8 and 9, the reader is advised that the bulk of documentation can be found in Chapters 2 through 7.

The following have a specific meaning in this investigation: (1) the terms *American education*, *schooling*, *public schools*, and *formal education* are used interchangeably and refer to elementary and secondary public education unless otherwise stated; (2) the term *disability* (and disabilities or disabled) is employed instead of *handicap* (and handicaps or handicapped), except in the cases involving presentation of statistical data where the original categorical terms in the sources are used; (3) the terms *mainstreaming* and *integration* are employed interchangeably; and (4) the terms *merger* of regular and special education and *purposeful mainstreaming* are used interchangeably.

Chapter 2 gives an account of how public education was established in the social-historical context of the U.S. from the Revolution to Civil War. Chapter 3 describes how, during the same period, institutional arrangements for special populations set the foundations for special education. Chapter 4 provides a description of the evolution of public education as a parallel process to the progressing developments in U.S. society from the end of the Civil War to 1990. Chapter 5 ties special education to general public education and American society during the

same period. Chapter 6 discusses the outcomes of PL 94-142 in connection with the mainstreaming movement until 1990. Particular attention is given to mainstreaming practices, barriers to the merger option, 'networking', and 'professional collaboration' as depicted in the mainstreaming literature. Chapter 7 scrutinizes the meaning of the 1980s' education reforms as an extension of educational reform since the end of World War II. The more recent attention to the disadvantaged or 'at risk' section of the American population is tied to this reform trend and more general societal considerations. Finally, Chapters 8 and 9 synthesize the conclusions of previous chapters. Special education and mainstreaming are viewed in the backdrop of American public education and society over the last two centuries. Particular attention is given to the currently developing service-delivery model of 'interagency collaboration' and its potential effects on and outcomes for disadvantaged students and students with disabilities. Based on this framework, recommendations for mainstreaming reform and further research are suggested.

CHAPTER 2

American Education from the Revolution to the Civil War

During the nineteenth century, the new Republic started creating its own institutions including public schools. The ideas of some influential Founding Fathers with regard to education were taken up by other powerful citizens and social groups in their campaigns for popular education and common schools. Discipline and obedience to authority and law were pronounced in these campaigns in which the 'Evangelical united front' and the 'friends of education' movements played leading roles. Cultural homogeneity was seen as a desirable goal because of a perceived threat from 'uncivilized' Old-world immigrants. Many different racial, religious, ethnic, linguistic, and cultural social groups encountered prejudicial attitudes from the Anglo-Protestant majority. In addition to other-imposed segregation, self-imposed segregation along these lines was a reality of American life.

Brief Background of Colonial Era Schools

During the colonial period the main themes of American education were piety, civility, and learning, although the latter was reserved for children of 'gentle birth'. The main means for propagating education were the family, the churches, and the community. In the later colonial years schools and colleges, once they had established a firm footing in the colonies, began to play a larger role (Cremin, 1970).

There were three basic types of schools during this period and they persisted well into the national era after the Revolution. First, the English school for students between the ages of three and fourteen years which was initially housed in a single building. In more populated areas it expanded to form primary and intermediate sections with variable organizational and title designations. The English school curriculum included reading, spelling, writing, and arithmetic with some geography and history. Second, the Latin grammar school for male students from the age of nine or ten years for a period of four or five years which was found primarily in the eastern large towns. Its curriculum focused on Latin and ancient Greek with additional studies in history, geography, and mathematics. Third, the Academy, frequently in the form of a boarding school, that enrolled any students it could attract. Its curriculum included English and variations of the Latin grammar school curriculum (Cremin, 1980, pp. 388-389).

The Situation After the Revolution

After the war the thirteen out-of-the sixteen original states that chose independence had almost no awareness of political union. To the contrary, they had political, financial and territorial differences and the central government had a very weak authority (Reisner, 1922, pp. 323-332). The main immediate concern was to establish and consolidate the new forms of government and impart to the general population a sense of the model citizen worthy of the new republic. Benjamin Rush, one of the Founding Fathers, expressed this concern in the following manner:

The American war is over; but this is far from being the case with the American revolution. On the contrary, nothing but the first act of the great drama is closed. It remains yet to establish and perfect our new forms of government; and to prepare the principles, morals, and manners of our citizens for these forms of government, after they are established and brought to perfection (Cited in Cremin, 1970, p. 564).

Thomas Jefferson had a genuine apprehension that the American people might turn into "a heterogeneous, incoherent, distracted mass" (Cited in Cremin, 1980, p. 8). The immigrants, consequently, would have to learn the realities of the New World and shed the ways of the Old world. Noah Webster, one of the proponents of public schools, wrote as a young schoolmaster in 1783:

The author wishes to promote the honor and prosperity of the confederated republics of America; and cheerfully throws his might into the common treasure of patriotic exertions. This country must in some future time, be as distinguished by the superiority of her literary improvements, as she is already by the liberality of her civil and ecclesiastical constitutions. Europe is grown old in folly, corruption and tyranny-in that country laws are perverted, manners are licentious, literature is declining and human nature debased. For America in her infancy to adopt the present maxims of the Old World, would be to stamp the wrinkles of decrepit age upon the bloom of youth and to plant the seeds of decay in a vigorous constitution. American glory begins to dawn at a favorable period, and under flattering circumstances. We have the experience of the whole world before our eyes; but to receive indiscriminately the maxims of government, the manners and the literary taste of Europe and make them the ground in which to build our systems in America, must soon convince us that a durable and stately edifice can never be erected upon the moldering pillars of antiquity. It is the business of Americans to select the wisdom of all nations, as the basis of her constitutions,-to avoid their errors,-to prevent the introduction of foreign vices and corruptions and check the career of her own,-to promote virtue and patriotism,-to embellish and improve the sciences,-to diffuse a uniformity and purity of language,-to add superior dignity to this infant empire and to human nature (Cited in Cremin, 1970, p. 569).

George Washington had similar ideas on the role education should play in the socialization of American citizens and immigrants and stated so in his farewell presidential address in 1796:

Promote then as an object of primary importance, institutions for the general diffusion of knowledge. In proportion as the structure of government gives force to public opinion, it is essential that public opinion should be enlightened (Cited in Cremin, 1980, p. 101).

Despite the calls from the most prominent Founding Fathers, however, there was fierce resistance from wealthy citizens in legislating tax-supported schools. Thomas Jefferson wrote to his friend George Wythe after his *Bill for the More General Diffusion of Knowledge* was passed by the House in 1785 but defeated in the Senate:

Preach, my dear sir, a crusade against ignorance; establish and improve the law for educating the common people. Let our countrymen know...that the tax which will be paid for this purpose is not more than the thousandth part of what will be paid to kings, priests and nobles who will rise up among us if we leave the people in ignorance (Cited in Cremin, 1980, p. 108).

Apart from active opposition to tax-supported education from certain social groups, there were major disagreements on the means of implementation. George Washington desired a national university. Thomas Jefferson wanted public schools, colleges, and libraries, while John Adams supported the role of churches in cultivating public discipline (Cremin, 1980, pp. 103-104). Despite these differences a substantial degree of consensus had developed by the end of the eighteenth century on what the role of popular education on the issue of self-government and its fundamentals might be : (1) popular schooling for literacy, a common core of knowledge, morality, and patriotism, (2) free press for illuminating the American people on public issues through the exposition of various perspectives, and (3) freedom of association for forming civic and political organizations (Brann, 1979).

Early Conceptions of a National Education System

In 1795 the American Philosophical Society announced an essay contest having as theme the best educational system for the newly formed republic. Samuel Knox, an alumnus of the University of Glasgow, and Samuel Harrison Smith, an alumnus of the University of Pennsylvania, were the winners of the contest (Rudolph, 1965). They both proposed very similar ideas of a uniform national education system with common curricula, textbooks, and standards under a national board of education (Knox, 1965; S. H. Smith, 1965).

The centrality of producing the ideal citizen was stressed by Samuel Harrison Smith (1965) in 1798 as follows:

The citizen enlightened, will be a free man in its truest sense. He will know his rights, and he will understand the rights of others; discerning the connection of his interest with the preservation of these rights, he will as firmly support those of his fellow men as his own. Too well informed to be misled, too virtuous to be corrupted, we shall behold man consistent and inflexible. Not at one moment the child of patriotism, and at another the slave of despotism, we shall see him in principle forever the same. Immutable in his character, inflexible in his honesty, he will feel the dignity of his nature and cheerfully obey the claims of duty (pp. 220-221).

Several other similar conceptions of a national education system, reprinted by Rudolph (1965), had been expounded during the early years of the republic by Benjamin Rush, Noah Webster, Amable-Louis-Rose de Lafitte du Courteil, and Simon Doggett. Their inceptive ideas revealed a common string of republican thought with respect to the role of education. They all had the following five common propositions: (1) that the success of the republic resides in education; (2) that the objectives of education should be the diffusion of knowledge, virtue, civility, patriotism, and the enhancement of learning; (3) that schools and colleges can accomplish these objectives on a massive scale; (4) that a national public system of education should provide

uniformity and be directly tied to the polity; and (5) that American education should produce the ideal citizen. Terms such as 'harmony', 'uniformity', and 'machine' were used to characterize the desirable education system for the republic.

Despite this consensus among republicans, several controversial issues remained unresolved during the first decades of the nineteenth century. First, the kind of knowledge to be diffused, that is, 'ancient' versus 'modern' knowledge (Kerber, 1970) or what today may be termed 'general' versus 'vocational' education. Second, the extent to which the federal government should be involved (Cremin, 1980, pp. 126-127). Third, the kind of financial arrangements which should be made to support education. Samuel Harrison Smith maintained that education should be public and tuition-free. Benjamin Rush advocated a combination of public and private funding (Rudolph, 1965). The argument of no public funding for secondary education could be found in Adam Smith's 1776 work *An Inquiry into the Nature and Causes of the Wealth of Nations*, even though he supported public financing for primary and popular education to instill habits of decency, piety, and discipline (A. Smith, 1937). According to Cremin (1980, p. 369), a half century after the 1795 essay contest the existing education system in the U.S. resembled parts of all proposed systems but no one in particular.

Reisner (1922) has claimed that the "early national period shows no conception of education as a means of creating a definite political culture by means of education. There was...no concerted action on the part of any central authorities to accomplish such an objective, because such authorities did not exist" (p. 359). And he goes on to say that the Founding Fathers "had not seriously considered nor practically applied the conception of public education as a

means of creating a national culture or of preparing the large body of citizen-voters for the responsible functions of citizenship in a democratic state" (p. 367).

Indeed the central authorities, if not nonexistent, were very weak; it is quite probable that many of the Founding Fathers did not concern themselves too much with education and public schools. However, leading figures who attained positions of power such as George Washington, Thomas Jefferson, and Benjamin Rush, to name a few, were very clear and categorical about the importance of education. In their minds education was not just crucial for the economic and political progress of the republic but for its very survival in the form they had envisioned. Their ideas planted the seeds for the development and growth of American public schools along with intended and unintended consequences.

The Protestant Influence and the 'Friends of Education' Movement

Alexis de Tocqueville, the famous European historian who travelled extensively in the U.S. during the early republican era, wrote in 1835:

Religion in America takes no direct part in the government of society, but it must be regarded as the first of their political institutions; for it does not impart a taste for freedom, it facilitates the use of it. Indeed, it is in this same point of view that the inhabitants of the United States themselves look upon religious belief. I do not know whether all Americans have a sincere faith in their religion...but I am certain that they hold it to be indispensable to the maintenance of republican institutions (de Tocqueville, 1945, p. 305).

The 1791 amendment to the federal Constitution had the provision that "Congress shall make no law respecting an establishment of religion, or prohibiting the free exercise thereof" (Cited in Cremin, 1980, p. 380). This sweeping stipulation separated religion from the state in a decisive manner. Lyman Beecher, a protestant leader and opponent of the provision initially,

changed his position later when he could see the outcome and he wrote in his diary in 1818 that the disestablishment of the churches was "the best thing that ever happened to the State of Connecticut. It cut the churches loose from dependence on state support. It threw them wholly on their own resources and on God" (Cross, 1961, p. 151). In effect the separation of religion and state stimulated church activities and the formation of voluntary religious organizations (Butts, 1950).

At the same time there were repeated calls by protestant leaders of various denominations to educate the masses of Catholic immigrants so that they would not fall under the influence of the Catholic church and its priests (e.g. Beecher, 1835; Bushnell, 1847, 1853). The ideology being fostered was that America would advance only through pious civility. In this ideology, nationalism, millennialism, and evangelism converged and formed a complex local, state, regional, and federal network of related organizations referred to as the 'Evangelical united front'. Its influence and growth in the decades following the Revolution was remarkable (Ahlstrom, 1972; Banner, 1970; Sweet, 1952).

The Evangelical united front included organizations such as *The First Day Society* founded in Philadelphia in 1790, the *New York Missionary Society* formed in 1796, the *Missionary Society of Connecticut* established in 1797, the *Massachusetts Missionary Society* constituted in 1799, the *American Board of Commissioners for Foreign Missions* created in 1810, the *American Education Society* established in 1815, the *American Bible Society* founded in 1816, the *American Sunday-School Union* formed in 1825, and the *American Home Missionary Society* constituted in 1826. All the major national organizations developed regional and local affiliate branches (Foster, 1960; Griffin, 1960). All these organizations tended to derive their leadership

from wealthy land owners and businessmen, conservative politicians and statesmen, well-known clerics, young professional men, and women eager to participate in public affairs (Naylor, 1971).

It has been well documented that the Evangelical united front organizations had "an interest in each other, depend[ed] upon each other, and assist[ed] each other" (Cogswell, 1833, p. iii) and that they "were explicitly, self-consciously, and overwhelmingly in the business of education" (Cremin, 1980, p. 59). They organized an educational campaign with elements of philanthropism, Christian education (mainly protestant values) and religious proselytization, social integration (providing a common culture), republicanism, and patriotism. This sweeping campaign proceeded from house to house and reached all the civil communities in the United States. In conjunction, they published a voluminous number of books and other printed material and were directly or indirectly involved in the establishment of schools and philanthropic or reformatory institutions (Billington, 1938; Foster, 1960; Power, 1940).

In most instances, Sunday schools preceded the common schools (E. W. Rice, 1917) and by the middle of the nineteenth century they were the location of more than half of the public libraries in the U.S. (Cremin, 1980, p. 68). In fact, there were many similarities between Sunday and early public schools in the materials used and the values propagated (W. B. Kennedy, 1966; McCord, 1976). In addition to schools, houses of refuge, penitentiaries, almshouses, and various asylums were created or assisted by protestant organizations. Their explicit intent was to rehabilitate, house, or segregate deviant, delinquent and dependent individuals (Grob, 1973; Hawes, 1971; Mennel, 1973; Rothman, 1971; Schlossman, 1977).

By the time the Evangelical united front had firmly embellished itself as a powerful social force in early American society, another movement advocating public education in schools for

all citizens was gaining momentum. By the 1840s and 1850s there were a number of highly visible leaders who called themselves 'friends of education' and included: James G. Carter and Horace Mann in Massachusetts; Henry Barnard in Connecticut; J. Orville Taylor in New York; Charles Fenton Mercer and Henry Ruffner in Virginia; Calvin H. Wiley in North Carolina; Caleb Mills in Indiana; Calvin Stowe, Albert Picket, Samuel Lewis, and Catharine Beecher in Ohio; Ninian Edwards and John Mason Peck in Illinois; John D. Pierce and Isaac Crary in Michigan; Robert Breckinridge in Kentucky; William F. Perry in Alabama; John Swett in California; and George Atkinson in Oregon. In terms of religious affiliation most of them were Congregationalists or Presbyterians, Mann was a Unitarian, Barnard an Episcopalian, Lewis a Methodist, and Peck a Baptist. Thus, most of the 'friends of education' had intimate connections with the various protestant denominations, ascribed to a millennialist republican conception of political economy, and drew on the organizational experience of voluntarism and political collaboration used successfully by the Evangelical united front (Cremin, 1980, pp. 175-176).

The 'friends of education' formed organizations such as the *American Institute of Instruction*, the *Western Literary Institute and College of Professional Teachers*, and the *American Lyceum*. They published and edited several periodicals such as the *American Journal of Education*, the *American Annals of Education*, the *Common School Assistant*, the *Common School Advocate*, the *Journal of Education*, the *Connecticut Common School Journal*, and the *Common School Journal* (Cremin, 1980, pp. 175-176).

Even though the Evangelical united front collapsed after the 1850s because of renewed denominationalism and factionalism, the influence of its values and objectives continued in the institutions which were the result of its efforts (Cremin, 1980, pp. 69-73). The advocates of

public education took it upon themselves to continue the endeavor of popular education by promoting formal schooling. Despite a diversity of influences and the subsequent adoption of its own political and social agenda, the 'friends of education' movement was in part a mutated, more secular version of the Evangelical united front. In time it would succeed in realizing some of the goals that had been espoused earlier by various protestant organizations.

The Establishment of Public Schools

The Constitution of the United States did not have much initially on the subject of education. By implication of the Tenth Amendment in 1791 education was placed under the power of the states and individuals. In the years following the Revolution, the federal government tried to make more attractive the selling of land on the frontier to prospective settlers from the East for the creation of new states. The Ordinance of 1785 of sale of parts of the Northwest Territory (not to be confused with the Canadian North West Territories) to military leaders from New England made specific provisions for endowing and setting aside land for educational institutions. The Northwest Ordinance of 1787 pertained to the sale of territory situated between the Ohio and Mississippi Rivers and the Great Lakes. The Congress sold the land to the Ohio Company with the provisions of setting aside land for school and literary institutions. The third article of the ordinance stated:

Religion, morality, and knowledge being necessary to good government and the happiness of mankind, schools and the means of education shall be forever encouraged (Cited in Reisner, 1922, p. 341).

To provide equal treatment to the older states, the federal government granted a percentage from the sales of public land for the exclusive purpose of education (Reisner, 1922, pp. 338-345).

During the period of the Union only New England states, with the exception of Rhode Island, had a tradition of encouraging some kind of public schooling. However, there was virtually no administrative organization and financial support varied from state to state. In 1789 a law in Massachusetts legalized the division of towns into school districts and in 1800 law gave district inhabitants the power to regulate taxes, meetings, buildings, and maintenance regarding local schools. In 1817 school districts became legal corporations with full power and responsibility before the law. In later years there were similar trends in other states toward this model of decentralized school authority (Rechner, 1922, pp. 345-357).

Horace Mann was probably the most prominent figure in the struggle for public schools in Massachusetts. He helped push legislation in the Senate of Massachusetts in 1837 for the establishment of a state board of education to which he was appointed secretary the very same year. During the following twelve years he conducted a statewide and eventually a nationwide campaign for public education in collaboration with other members of the 'friends of education' movement (Messerli, 1972). His main concern was primary education and despite disagreements with many evangelists, Mann had similar conceptions with respect to the objectives of public schools: Christian piety, civility, patriotism, a common culture rooted in the Anglo-Protestant tradition, and skills that would enable individuals to build a wealthy society (Kendell, 1968; McCluskey, 1958; Straker, 1955; Vinovskis, 1970). By the time of his death he was perceived as the leading advocate of public schools and his ideas spread to the rest of the U.S., to Europe, and even to South America (Messerli, 1972).

Despite the leading role of New England states, it was the state of New York that first developed a comprehensive system of public primary schools administered by the state. The trend

began in 1837 (Reisner, 1922, p. 387) and through controversial legislative battles in the 1840s, 1850s, and 1860s common schools became tax-supported and tuition-free (Cutler, 1972; Kaestle, 1973; LeCount, 1971).

There were few public schools in the South until the Civil War. As early as 1779 Thomas Jefferson had proposed a state-supported school system for the poor of Virginia. His plan was rejected by wealthy citizens who refused to pay taxes for such a purpose (Sigmon, 1983). When in 1796 the Virginia legislature approved the creation of public elementary schools, it was left up to county courts to decide legally their establishment and maintenance. Jefferson was convinced, and events confirmed his judgment, that the local option would incapacitate the bill since most county judges were of Caucasian and wealthy background. During the early nineteenth century many affluent citizens in most states were not very enthusiastic about paying taxes for the education of the poor (Cremin, 1980, pp. 108-109).

Parallel to the creation of public schools, the Roman Catholic church had started establishing its own parochial schools since the beginning of the nineteenth century. In fact, the Catholic parochial system was the fastest growing denominational school organization. Catholic clergy had repeatedly pointed out, as in New York State in 1840 for example, that the public nondenominational schools were not nondenominational at all because they had incorporated protestant morality and doctrine in their curriculum and they were hostile toward Catholicism (Gabert, 1971; Lannie, 1968; Pratt, 1967).

The Presbyterian (Sherrill, 1932) and Lutheran (Damm, 1963) churches as well tried to create their own parochial school systems between 1846 and 1870. They perceived that there was an ever increasing separation between public schools and religion.

In the rural areas, the one room school with a single teacher remained the prevalent organizational norm until the Civil War mixing children of all ages. In many cities, nevertheless, the number of students was growing rapidly while resources remained scarce. By the 1870s a grading system based on combinations of age and academic achievement was beginning to develop. The creation of graded education from primary through intermediate to high school was well on its way (Cremin, 1980, p. 396).

Three new types of school developed in the U.S. during the nineteenth century. First, there was the infant school for children between the ages of two and seven. Its origins can probably be traced back to Robert Owen's communal experiment in Great Britain. This innovation died as a practice but it was later revived in the 1850s as the kindergarten (D. May & Vinovskis, 1977). Second, there was the high school for students continuing from primary, grammar, or intermediate schools. It was a public school at little or no cost as an alternative to the Latin grammar school (E. E. Brown, 1902). Third, the so-called 'supplementary school' or 'school of deficiencies', nowadays referred to as special school. It was designed for delinquents and deviants, people with disabilities, and minority groups (African-Americans, Aborigines, and Caucasian immigrants as the Irish) who were thought to be in need of compensatory education (Hawes, 1971; Kanner, 1964; Pickett, 1969; Schwartz, 1956).

By the 1870s primary public schools were quite common in many states, even though some states passed compulsory schooling laws as late as 1918. Studies examining the development of public school systems have been conducted at the city level (e.g. Duffy, 1968; Geltner, 1972; Katz, 1968a; Ravitch, 1974; Schultz, 1973; Troen, 1975; Tyack, 1967, 1974) and

at the state level (e.g. H. B. Brooks, 1949; Gideonse, 1963; Jorgenson, 1966; Kaestle & Vinovskis, 1980; Macauley, 1972; Matheson, 1963; Mathews, 1965; Pulliam 1965; Quick, 1963).

Teachers and Curricula

Until 1830 public schooling in the U.S. was not conceived as an obligation and whatever schools existed, according to Reisner (1922), "had little vitality" (p. 366). In terms of buildings and teaching tools elementary education was extremely inadequate. Not only the facilities were meager but teachers had barely any training.

As far as the teachers are concerned, they were like the general run of those who taught school in all Western countries before the state turned to education to make it a tool for creating citizens. Barely possessed of the limited information they were expected to pass on to the pupils and conscious of no superior methods of instruction....Harsh discipline...secured inactivity when the child was otherwise out of employment (Reisner, 1922, p. 359).

Before the Civil War most teachers continued to be trained, if trained at all, by apprenticeship to a teacher in the school. In many cases there was not even apprenticeship involved - teachers would simply start their teaching careers by imitating what they had seen as students in the schools. In general, the effort to prepare teachers professionally through student-teaching and teacher associations or institutes had barely started in the 1830s and 1840s (Elsbee, 1939).

Teaching was the only profession open to women before the Civil War. During the second third of the nineteenth century it would become an increasingly female occupation (Schweikert, 1971) for several reasons. Women were thought to be more suitable to work with young children by extending the reach of motherhood from the family to the school. Men who acted as

administrators thought that women were more open to 'suggestion'. Most importantly, women were willing to take up teaching for half or even a third of the salary of male teachers (Elsbee, 1939).

Even when women had entered teaching in vast numbers the concept of professionalization was reserved for men. It was mainly male educators who attained professional training and filled almost all administrative positions. Women found themselves in the peculiar situation of making up the majority of the teacher population in a profession dominated by men. Female teachers ended up being in the trenches of public schools without having any substantial input as to their planning and operation (Mattingly, 1975).

In terms of teaching practices, many teachers placed the responsibility of learning exclusively on students and acted simply as disciplinarians. Others just moved students in concert through the material by merely reciting rather than explaining. Only a very few teachers attempted to interpret, elaborate, or embellish the textbook material (Finkelstein, 1970).

Most teachers relied almost exclusively on textbooks. The curriculum in public schools had a nondenominational protestant perspective and stressed the superiority of Americans and American institutions. In addition, it taught quite conspicuously the inferiority of non-Caucasian races even though it simultaneously condemned the evils of slavery - most textbooks were produced in the Northeastern states (Carpenter, 1962; Michaelsen, 1970; Nietz, 1961, 1966).

The predominantly nondenominational protestant and racist orientations of public schools appear to have had an important consequence. Students were socialized to believe in the superiority of Caucasian-Americans and the values and ethics of protestantism. Consequently,

individuals or social groups who did not conform to this norm, either for racial, religious, ethnic, cultural, or ability reasons, were perceived as 'inferior', 'abnormal' or 'deviant'.

Discipline and Obedience to Authority and Law

Discipline was a theme that had persistently been impressed upon the American people by the churches and the Evangelical united front. It was and still is one of the most fundamental and enduring objectives of formal schooling, especially in its primary and secondary stages. A plethora of school documents testify as to the importance that school authorities, from administrators to teachers, placed on inculcating students with a sense of self-restraint and absolute obedience to their teachers and the law. The grammar schoolmasters of Boston, for example, stated in their *Remarks on the Seventh Annual Report of the Honorable Horace Mann, Secretary of the Massachusetts Board of Education* in 1844:

Implicit obedience to rightful authority must be inculcated and enforced upon children as the very germ of all good order in future society; no one, who thinks soundly and follows out principles to their necessary results, will presume to deny (Cited in Finkelstein, 1974-75, p. 355).

The report of a national commission of school administrators in 1874 reaffirmed this view as one of the main tenets of American educational theory and practice:

The teacher has an obligation to train the pupils into habits of prompt obedience to his teacher...in order that he may be prepared for a life wherein there is little police-restraint on the part of constituted authorities (Doty & Harris, 1874, p. 13).

The Boston School Committee in the 1870s viewed immigrants as possessing a culture unworthy of existing in America, unruly and ignorant. It perceived American schools as overseers of the moral, spiritual, and intellectual training of these immigrants:

Taking children at random from a great city, undisciplined, uninstructed, often with inveterate forwardness and obstinacy, and with the inherited stupidity of centuries of ignorant ancestors; forming them from animals into intellectual beings, and...from intellectual beings into spiritual beings; giving to many their first appreciation of what is wise, what is true, what is lovely and what is pure (Cited in Katz, 1968b, p. 120).

Throughout the first half of the nineteenth century most teachers relied on corporal punishment in what was euphemistically called 'muscular Christianity' (Holbrook, 1885, p. 19) and humiliation (W. Brooks, 1915; Burton, 1833) to maintain obedience.

In the second half of the nineteenth century, teachers used a combination of physical punishment and persuasion to make their students aware of noncompliant behavior and establish voluntary observation of rules (Hubbard, 1879). In reviewing the literature Finkelstein (1974-75) found that this combination had mixed results of success and failure. She describes a frequently used method of having students registering their violations and provides a quotation on a teacher's unsuccessful attempt:

To develop a scrupulous honesty and a high sense of honor we kept a record of our deportment and reported the exact percentage in response to roll call at the end of each day. For our guidance, Miss Pember made a list of possible offenses with a scale of penalties...whispering:-2 points, hair pulling:-4; spit balls:-6; putting rubber in the stove:-15. If we fell below fifty, we had to stay after school and receive one tap of a ruler on the hand for each point below 50. This prompted competition for the lowest score. The taps became more numerous and the class, numbering 40, had to be divided into squads only one of which could be punished on the same day and the ruler taps lagged further and further behind...She...lasted until Christmas vacation (pp. 358-359).

By the 1870s many cities and towns had become industrialized and wherever factories appeared the problem of nurturing industrial discipline in workers had to be resolved (Pollard, 1963-64; Rodgers, 1978; E. P. Thompson, 1967). Many schools in urban centers "through the very character of their organization - the grouping, periodizing, and objective impersonality were

not unlike those of the factory" and, in general, the "values and attitudes associated with industrial discipline were...inner discipline, hard work, punctuality, frugality, sobriety, orderliness, and prudence" (Cremin, 1980, p. 351).

The Lancasterian schools in large cities, applying military concepts and philosophy in their daily operation inside and outside the classroom, were seen as the ideal solution. Educators from all over the U.S. would come to city schools to observe the prevailing practices. Observers of a New York city primary school wrote in their 1867 report to the Board of Commissioners of Baltimore:

The regularity of their movements, their simultaneous enunciation, their young voices mingling in the melody of their childhood's songs....When they sing "Now we all stand up," they spring to their feet, the entire mass with apparently a single motion. When they sing "Now we all set down," they drop into their seats. "Now we fold our arms," all arms are folded. "Now we are nodding, nid, nid, nodding," the sea of little heads move to right and left (Report of the Committee Appointed to Visit Public Schools of Philadelphia, New York, Brooklyn and Boston to the Board of Commissioners of Baltimore, 1867, pp. 35-36).

In most instances teachers associated the concepts of collaboration with cheating, and discipline with learning. Punishment was common for students who helped or were helped by other students. There was a strongly held assumption by teachers that students could learn best on their own (Finkelstein, 1974-75). The recollection of a Southern man punished for helping another student is a representative example:

[The teacher]...carried me down to the spring...he repeated a verse from the Bible, about sparing the rod and spoiling the child; he then knelt, and prayed a short prayer, in which he asked his Heavenly Father to forgive the awful crime of which I had been guilty, and then rose, and catching me by my long hair, almost lifting me from the ground, he administered an awful whipping (Fontaine, 1908, pp. 14-15).

Communication among students during class, even eye contact, was prohibited. Various methods were implemented to discourage it: placing desks in perfect rows "for the advantage", as a teacher explained, "of making it difficult for students to look at one another" (Orcutt, 1898, p. 67); not allowing playing or visiting (Duffield, 1906, p. 53); or inventing ingenious methods for passing along teaching materials. J. M. Rice (1893) described one of the practices he observed in a New York city school:

All children in the room stare fixedly at a point on the blackboard. When material of whatever nature, is handed to the children...[it is] passed along sideways until each child in the row has been supplied. During this procedure the children are compelled to look straight in front of them, and to place their hands sidewise in order to receive the material, without looking whence it comes (p. 33).

Barbara Finkelstein (1974-75) has called the incorporation of strict discipline and absolute obedience in American nineteenth century schools 'pedagogy of intrusion'. Students "could satisfactorily submit to the rules and regulations of the teachers only by purging themselves of their individuality, by submerging their identities, and by incorporating the goals of the teachers as their own" (p. 364). This intrusive pedagogical method was "designed to harden the emotions, to break the will as well as to discipline the intellect" (p. 368).

Pariahs

Educate him [African-American] and you have added little to his happiness - you have unfitted him for the society and sympathies of his degraded kindred, and yet you have not procured for him and cannot procure for him any admission in to the society and sympathy of white men (An Address to the Public by the Managers of the Colonization Society of Connecticut, 1828, p. 5)

From the very beginning of the formation of the Republic certain social groups were denied fundamental citizenship rights. While Caucasian-European immigrants of Irish, German,

Norwegian, Swedish, and other nationalities were thought of being capable to integrate in American society, African-American and aboriginal people were met with harsh treatment. Others such as Chinese and Japanese first-generation immigrants were altogether denied naturalization. The barriers of race, in contrast to those of ethnicity and religion, were considered to be insurmountable (Cremin, 1980, pp. 242-245).

The Constitution ratified in 1778 did not allude to slavery explicitly but tolerated it as a fact of American reality (Cremin, 1980, p. 218). African-Americans, whether enslaved or free, were considered inferior and inassimilable. Even those residing in the northern states were segregated and denied citizenship rights including formal education in many instances (D. B. Davis, 1975; Ment, 1975). The prevailing attitude and pedagogy of Caucasians was to reinforce the conception of African-American inferiority (Fredrickson, 1971).

Aboriginal people were initially thought to be assimilable to American society (Dippie, 1970). The federal government tried several schemes of acculturation including church missionaries without significant success (Beaver, 1966; Berkhofer, 1965). After the War of 1812, when many aboriginal nations sided with the British troops invading from what is today Canada, there was a major change in actual policy to evict natives forcefully from their lands (Foreman, 1953; Viola, 1974). In the end the conception that aboriginals were not capable of being assimilated by American society prevailed and reservations were set up in the 1840s and 1850s as an 'alternative to extinction' (Trennert, 1975).

It is interesting and not at all incidental that African-Americans and aboriginals were segregated in every social sphere including schooling. It was perceived then that "special groups of students having special educational needs...would best be met in separate educational

institutions, including handicapped youngsters, particularly the blind, the deaf, and the feeble-minded; youngsters judged incorrigible or delinquent; and black and Indian youngsters deemed unacceptable in regular classrooms" (Cremin, 1980, p. 390).

In many instances even Caucasian immigrants were stigmatized if their behavior did not conform to the cultural expectations of Anglo-Protestant middle class. Some of them would endure unfavorable consequences, while others, as in the case of Michael Walsh, would be able to overcome their traumatic public school experiences. Michael Walsh was an Irish immigrant who lived in the U.S. from the 1820s until his death in the late 1850s. He served three terms in the New York State Assembly, one term in Congress, and two prison terms on Blackwell's Island. He also worked as a manual laborer and a journalist and his comments on public schooling were but rhapsodic:

I never attended school but three quarters, and then I believe I got turned out once or twice. Yes, sir, I got turned out, for what the school-masters in their benighted stupidity termed "bad conduct," but which subsequent events have satisfactorily proven to have been merely a striking and precocious manifestation of genius (Cited in Cremin, 1980, p. 450).

Throughout the nineteenth century courts would determine that the operation of special or separate schools was legal (Cremin, 1980, p. 390). Two cases deserve particular attention. In 1838, in the *Ex Parte Crouse* case, the father of a Philadelphia child named Mary Ann Crouse tried unsuccessfully, citing the Sixth Amendment to the American Constitution, to overturn her commitment to the House of Refuge. The court, basing its decision on the old legal doctrine of *parens patriae*, determined that the natural parents' authority could be surpassed by the common guardian of the community if the natural parents are unequal to the task of education or unworthy of it (Fox, 1970).

In the 1849 case of *Roberts v. City of Boston*, the father of an African-American youngster named Sarah Roberts tried, on the basis of the Massachusetts Constitution guarantees, to enrol her in a school attended by Caucasian-American children closer home than the school attended by African-American children where she was assigned. The court upheld the right of the city to operate 'separate but equal' facilities for African-Americans (L. Levy & Phillips, 1950-51).

It seems that the predominant social attitudes and perceptions of the time stigmatized social groups that had apparent physical or cultural differences from the Anglo-Protestant majority. In many instances, this stigmatization could educationally translate into denial to provide education or into segregation within separate educational institutions.

Segregation: A Reality of American Life

With the influx of immigrants during the 1840s, 1850s, 1860s and 1870s social segregation along religious, linguistic, and ethnic lines became a fact of life. Racial segregation of African-Americans and aboriginals had already been embedded long before the Revolution (Cremin, 1980, pp. 376-378).

In the period between the 1820s and 1840s many utopian experiments were conducted. Communities such as the Shakers, the Rappites, the Moravians, the Mennonites, the Transcendentalists, the Mormons, New Harmony, and Oneida isolated themselves voluntarily from the outside world. Most of them disbanded a few years after their creation and only a few such as the Mormons or the Mennonites managed to flourish and survive. Despite their failure, many of these communities gave birth to a plethora of humanistic educational ideas, such as the

infant school and child-centered pedagogy, and managed to teach other people in the areas of resourceful craftsmanship, teamwork, social conduct, and millennial hope (Bestor, 1950; Tyler, 1944; Webber, 1959).

While utopian societies secluded themselves in isolated rural areas, the vast majority of immigrants settled in their own neighborhoods in villages, towns, and cities. Their segregation took place on the basis of: religion, for example the Irish Catholics (R. E. Kennedy, 1973; MacDonagh, 1976); language, religion, and class, as in the case of Germans (Kollmann & Marschalck, 1973; M. Walker, 1971); or race as in the instance of Chinese (Barth, 1964; Weiss, 1974). Segregation developed both upon voluntary and involuntary lines. Irish Catholics segregated themselves within their own neighborhoods in large cities to protect their culture and religion but they were also segregated by those outside. Germans created their own home towns to maintain their language and religion. Chinese segregated themselves and were segregated by others.

New York city, at the time, represented perhaps the best example of a large American city separated along ethnic, linguistic, and religious lines. By the 1850s approximately half its inhabitants reported themselves as foreign born (Rosenwaike, 1972). Consequently, many inhabitants socialized and in many cases educated themselves within the confines of their community **without** much meaningful contact with outsider communities; or the education they received at home and in their community was frequently antagonistic to the education received in public schools (Cremin, 1980, pp. 440-449).

Segregation in nineteenth century America, both voluntary and involuntary, was the norm. Whether one agreed or disagreed with it was irrelevant simply because it was a fact of life. It

was justified on the basis of racial, linguistic, religious, and ethnic differences. The key word is 'different'. Individuals or social groups who perceived themselves or were perceived by others to be different segregated themselves or were segregated by society, or quite often a combination of both. Undoubtly the strong mentality behind social segregation in many aspects of American life, in combination with other social factors, would play a significant role in the segregation of individuals and social groups with disabilities.

Emerging Themes

Given its popular character education [until the Civil War] was ever vulnerable to direct confrontations over financing and support and intense conflicts over the substance of the curriculum....It was Aristotle who once remarked that when people set out to educate, they invariably have in mind some vision of the good life, and, since visions of the good life will surely differ, education is inescapably caught up in politics. Americans of the early national era were aware of this. In fact...they defined what they were and what they hoped to be in conflicts over the ends and means of education (Cremin, 1980, p. 487).

The emerging themes have been grouped in four categories: general social context, educational features, objectives of public schools, and consequent implications.

In the general social context, education was envisioned since the founding of the Republic as the crucial factor of building and maintaining American society. The concern of many Founding Fathers for a more or less homogeneous culture and Americanization of immigrants was one of the prime reasons. Cremin (1980) has suggested that "concerning the new politics of public schooling....the development of state systems must be seen in a nineteenth-century context of localism: neither the ideology nor the technology of political control at the state level had been developed to the point where it was seen as a replacement for political control at the district,

town, or county level" (p. 174). In the absence of substantial federal and state involvement it was the 'Evangelical united front' that ran an extensive educative campaign to maintain the Anglo-Protestant and republican nature of the early Republic. It was succeeded by the 'friends of education' movement that went on to realize some of the goals of the Evangelical united front particularly in relation to schooling.

Several other social factors had a bearing on the general social context. Racism was an embedded attitude in the minds of Caucasian-Americans who considered themselves superior to all other races. Further, Anglo-Protestant Caucasians, who comprised the majority of the population at the time of the Revolution, had an intolerance toward other religious, linguistic and cultural groups who banded with their own kin to preserve their culture. In this context segregation was established as a *de facto* reality of American society in which various social groups segregated themselves and were segregated by others.

Industrialization was another factor that posed a substantial challenge. The concepts of social order and discipline had been impressed upon the American population by the Evangelical united front but they acquired a new meaning with the advent of industrialization and the idea of society as primarily an economic entity (LeCount, 1971; West, 1965, 1967, 1975). In conjunction, the family began to lose some of its functions to other institutions such as factories (A. F. C. Wallace, 1978), asylums (Rothman, 1971), reformatories (Hawes, 1971) and penitentiaries (Lewis, 1965), all of which had precedents in England and the rest of Europe.

In terms of the features of American education, "popularization and multitudinousness" (Cremin, 1980, p. 483) were its prominent characteristics. Popularization was evident in the many forms of educational opportunity either through formal schooling or informal means such as the

family, churches, newspapers, or the community. Despite the early calls for 'uniformity' American schools, public or otherwise, remained quite diverse until the Civil War. Various groups and organizations "used education for their own purposes, which could be demeaning and coercive as well as enhancing and altruistic" (Cremin, 1980, p. 497).

Katz (1971) has identified four educational models that prevailed and coexisted during that time. Paternal voluntarism, as embodied by the Public School Society in New York city, has been described as a preindustrial phenomenon. Democratic localism, as exemplified by rural school districts, and corporate voluntarism, as illustrated by incorporated academies, have been depicted as rural phenomena. Finally, incipient bureaucracy, as represented by the Boston public schools at midcentury, has been portrayed as an urban phenomenon.

With regard to the objectives and functions of public schools, differentiation between stated and implied or hidden objectives is necessary. The objectives of primary education according to Thomas Jefferson, as they were adopted in the *Report of the Commissioners for the University of Virginia* in 1818, were stated as the following:

To give every citizen the information he needs for the transaction of his own business;

To enable him to calculate for himself, and to express and preserve his ideas, his contracts and accounts, in writing;

To improve, by reading, his morals and faculties;

To understand his duties to his neighbors and country, and to discharge with competence the functions confided to him by either;

To know his rights; to exercise with order and justice those he retains; to choose with discretion the fiduciary of those he delegates; and to notice their conduct with diligence, with candor, and judgment;

And, in general, to observe with intelligence and faithfulness all the social relations under which he shall be placed (Cited in Padover, 1943, p. 1097).

In summary, the objectives of American education and public schools from the Revolution to the Civil War were: literacy in an increasingly standardized American English and some

arithmetic; a common belief system and Christian morals derived mainly from nondenominational protestantism; republicanism, American patriotism, and the production of an ideal citizen; a disciplined work force compatible with an industrialized economy (primarily in urban areas and well into the nineteenth century) (Cremin, 1980); social control and order (Katz, 1968b); and the exclusion, by implication, of individuals and social groups not conforming to the social-cultural expectations of mainstream public schools.

The major implication emerging from the above is that American education and public schools developed in a social context of contradictions where there was a coexistence of visions of liberalism and racism, of the ideal citizen and the conformist citizen, of utilitarianism and classicism, of freedom and slavery, of equality and prejudice, of social mobility and class privilege, of republicanism and social control, of inclusion and exclusion. American society was, and in many respects still is, a society of great expectations and concurrent distresses.

To a certain degree American education and public schools of that era were a theater of opposing interests and struggle. For some social groups and individuals schooling became a means for social mobility and advancement. For others, however, formal schooling was a means of exclusion or segregation for various reasons: some were geographically isolated; others simply perceived schooling as irrelevant to their aspirations even though they had access to it; most women were excluded because of tradition; some groups such as the Mennonites segregated themselves out of principle; still others were excluded or segregated on the basis of race such as African-Americans and Aborigines, 'undisciplined' behavior such as delinquents or culturally differing immigrants, and ability such as individuals with various disabilities.

CHAPTER 3

Institutional Arrangements for 'Needy' Children and Origins of Special Education from the Revolution to the Civil War

Proposals that promise the most grandiose consequences often legitimate the most unsatisfactory developments. And one also grows wary about taking reform programs at face value; arrangements designed for the best of motives may have disastrous results (Rothman, 1971, p. 295).

The fear of prominent citizens and powerful groups in the early nineteenth century that paupers, dependents, and deviants would destabilize the social order brought about a change in the previous arrangements of social amelioration. Amelioration and social control were combined as motives in the creation and development of a number of special institutions: houses of refuge, poorhouses, reformatories, asylums, penitentiaries, and training schools for the 'feeble-minded'. By the Civil War, the motive of social control had largely displaced the educative and ameliorative motives of these institutions.

Transformation of Eighteenth Century Attitudes Toward Dependency and Deviance

During the colonial era it was perceived that dependency and deviance were "providentially caused" (Rothman, 1971, p. 155). All poor and dependent individuals were viewed as brothers and sisters and were helped primarily within the community. Institutional separation was an alien concept and the few institutions that existed in the few larger cities "were clearly places of last resort" (Rothman, 1971, p. xiii).

In the first few decades of the nineteenth century, however, there was a dramatic change in the public perception of the origins of dependency. The notion of the original sin was replaced by a view of the primacy of environmental influences (Hawes, 1991, pp. 11-12). The source of dependency was no longer an exclusive individual attribute. The family and the community were seen as influential contributors to the production of poverty, criminality, and deviance (Rothman, 1971, p. 71).

The relative collapse of rigid social structures after the Revolution and the metamorphosis of American society into a republic had the consequence of loss of "hierarchy and deference", and adherence to the moral standards as a means of maintaining social order became a matter of individual conformity (Hawes, 1991, p. 12-13). Poverty was blamed on the poor as the result of immorality and there was a pervasive perception that "[v]ice, crime, and poverty were stops on the same line, and men shuttled regularly among them" (Rothman, 1971, p. 164). The poor came to be seen not as brothers and sisters but as a threat to the common welfare.

It was conceptualized by affluent community and religious leaders that if the conditions producing dependency and crime could be altered then deviance would disappear or subside. Several strategies were employed: advising the family on the upbringing of children or what Hawes (1991) has called "republican motherhood" (p. 13), closing down places of 'corruption' and 'immorality' such as houses of prostitution and taverns (Rothman, 1971, p. 71), establishing and promoting public schools (Hawes, 1991, pp. 13-15), and organizing separate settings where deviants could be rehabilitated free of societal contaminating influences (Hawes, 1991, pp. 15-17; Rothman, 1971, p. 71).

The latter strategy was thought to be the most appropriate solution for deviants and dependents. Relief in the community, the preferred method of alleviation during the colonial era, was seen in the nineteenth century as a significant factor in pauperism (Rothman, 1971, p. 166). It was largely discontinued in favor of more formal arrangements and American society witnessed a radical switch from community and familial to institutional solutions (pp. xiii-xiv). The founding and expansion of a variety of institutions was neither random nor disjointed. Rothman (1971) has suggested that scientific developments alone cannot explain this social phenomenon:

Prisons, poorhouses, and orphan asylums grew up at the same time, and this coincidence suggests that the society was reacting to more than psychiatric doctrines. By moving on all fronts at once, it had other and broader considerations in mind. The march of science cannot by itself explain the transformation in the American treatment of the insane, nor the remarkable coincidence of the shift in practices toward other deviants and dependents as well (pp. xv-xvi).

Urbanization and Social Amelioration and Control

Industrialization, urbanization, and immigration presented challenges of immense magnitude to the resilience of American society in a manner that "a vast array of social pathology resulted from the rapid and severe dislocations in patterns of living" (Adams, 1971, p. 25). Prosperous community and religious leaders perceived a great danger to the continuing survival of the existing social arrangements from the large numbers of immigrants entering the United States. Philip Hone, a businessman and mayor of New York city in 1825, wrote in his diary:

The boast that one country is the asylum for the oppressed in other parts of the world is very philanthropic and sentimental, but I fear that we shall before long derive little comfort from being made the almshouse and place of refuge for the poor of other countries (Tuckerman, 1910, p. 64).

And in its twenty-fourth annual report in 1840, the New York city Society for the Reformation of Juvenile Delinquents stated:

And besides our own neglected and depraved population, the tide of emigration, now setting in stronger every year, while it enriches our country, leaves much of its refuse in our city. Pauper families, and even felons, are not infrequently sent over to us as a cheap way of disposing of them, by selfishness or mistaken humanity of those whose duty it is to provide for them at home, thus swelling the number of houseless, friendless and lawless youth, drifting loose upon society, to become utterly shipwrecked, unless the active hand of benevolence is stretched to save them (Cited in Pickett, 1969, p. 1).

A number of factors contributed to the disturbance of family life and the increase of homeless children in New York city: employment of fathers in distant-from-home locations, death of one or both parents because of harsh living and working conditions, abandonment, and unemployment. The Irish family in particular was severely disrupted by emigrating to America. Its patterns and controls broke down in the face of an incompatible urban environment. In conjunction with lack of professional and business skills, Irish families and individuals found themselves at the bottom of the social ladder. Anglo-Protestant leaders in New York city, for example, stereotyped the Irish family as "chaotic and disorganized" (p. 16) and as being inherently incapable of managing its own affairs. In their mind Irish people were unruly, heavy alcohol users, criminals, and prone to vice and immorality (Pickett, 1969, pp. 1-20).

Fearing the 'dangerous classes', affluent citizens of mainly protestant affinities organized philanthropic societies that played an instrumental role in the establishment of rehabilitative institutions. Mennel (1973) has commented on the ulterior motives of those 'child saving' citizens:

Operating in rapidly developing urban societies, these frankly elitist men could no longer enforce their policies as holders of key positions in church and government, from which their ancestors had traditionally supervised community affairs. Rather, they believed that the maintenance of their authority now depended upon founding a host of benevolent societies, each devoted to a particular cause (p. 7).

In New York city, for example, Thomas Eddy was the superintendent of Newgate Prison and a member of the government of the New York Lunatic Asylum, the American Bible Society, the African Free School Society, and the Public School Society. In general, the leaders of the Public School Society of New York and the leaders who found the New York House of Refuge were largely overlapping groups (Mennel, 1973, p. 7).

Houses of Refuge and Reformation

The New York House of Refuge

In 1825 the New York House of Refuge was established as the first of its kind in America for the rehabilitation of juvenile delinquents. Voluntary associations such as the Society for the Prevention of Pauperism, which was later renamed Society for the Reformation of Juvenile Delinquents, were formed by prosperous New York citizens to lobby for the establishment of a House of Refuge. Thomas Eddy and John Griscom, both Quakers, Charles Haines and James Watson Gerard, both lawyers, Cadwallader D. Colden and Stephen Allen, both New York city mayors, and other influential citizens such as Isaac Collins and John Pintard were some of the most prominent leaders in these societies. They considered crime a product of the 'dangerous' and 'vicious' classes of immigrants and the poor, and they supported schooling, reformatory or

otherwise, to instill a sense of piety and discipline (Mennel, 1973, pp. 3-4; Pickett, 1969, pp. 23, 35-47, 110-115).

The motives of social welfare, child protection, and self-serving social control were intermixed in the making of the House of Refuge. Samuel Akerly wrote to Stephen Allen who became the vice-president of the Society for the Reformation of Juvenile Delinquents:

...if moral and Religious benefits are not inculcated during the period of youth, there will be little or no hope of their making an impression on the minds of old and hardened offenders (Cited in Pickett, 1969, p. 52).

The *New York American* wrote in December 20, 1823:

To rescue and cherish the unprotected, especially the young, the ignorant, the helpless, who are exposed to crime, misery, and to utter ruin, is the sacred duty of us all; and in the abandoned and wretched state of hundred of poor children of this city, a scene of prescent [sic] suffering and a prospect of future mischief is presented, which needs only to be properly viewed to excite the compassion of the good, and the apprehensions of the thoughtful (Cited in Pickett, 1969, p. 21).

James Gerard, as a member of the Society for the Prevention of Pauperism, stated in 1823:

...[there is] a great increase of juvenile delinquency within these few years past, and of the necessity of immediate measures to arrest so great an evil....Those whose walks are limited to the fairer parts of our city know nothing of the habits, the propensities and criminal courses, of a large population in its remote and obscure parts....[I]t is with pain we state that, in five or six years past, and until the last few months, the number of youth under fourteen years of age, charged with offenses against the law, has doubled; and that some boys are again and again brought up for examination, some of whom are committed, and some tried; and that imprisonment by its frequency renders them hardened and fearless (Cited in Hawes, 1971, p. 28).

The *New York Evening Post*, in anticipation of the House of Refuge, wrote in March 23, 1824:

If we can clean our streets of the numberless depraved boys and girls that now infest them, and most of whom are frequently tenants of our Bridewell or Penitentiary, a substantial good will be effected and the public relieved of a considerable portion of the taxes raised for these institutions (Cited in Pickett, 1969, p. 59).

Stephen Allen described his understanding of the purpose of the House of Refuge in 1824:

...depraved youths of both sexes who are growing up in idleness and vice among us, and who by - petty thefts and other evil practices, are not only an injury to the City generally by depredating upon our property and increasing the public burden for their maintenance [sic] in our prisons, but are contaminating all who come within the reach of their influence (Cited in Pickett, 1969, p. 54).

The managers of the New York Society for the Reformation of Juvenile Delinquents tabled an annual report each year. Among other topics, the managers discoursed on the causes of juvenile delinquency. The causes mentioned in the annual reports from 1826 to 1856 have been summarized by Pickett (1969): 'ignorance', 'parental depravity and neglect', 'intemperance' (alcohol use), 'theatrical amusements', 'bad associates', 'pawnbrokers', 'immigration', 'city life in general', 'adult crime', 'idleness', 'absence of religious control', 'poverty', 'temptation', 'inherent depravity', 'unemployment', 'loss of parent', 'uncleanliness', 'public prison', 'ease of evading punishment', 'indiscriminate charity', 'lewd materials', 'houses of ill-fame', 'unsupervised work', and 'volunteer fire department'. Even though scant references were made to deteriorating city conditions and a changing economy, the managers never questioned the overall social and economic system as producing delinquency (pp. 191, 116-117).

In terms of demographic statistics, it appears that four out of every ten children admitted in the period between 1830 and 1855 were of Irish origin. More specifically the statistics were the following: Irish 41.2%, American 26.2%, African-American 11.2%, English 8.6%, German 3.6%, Scotch 2.6%, Welsh 1.2%, French 1.2%, Canadian 1%, and other 3.2% (Pickett, 1969, p. 190). Children of Irish origin were the major target of child savers during that era because Irish immigrants were viewed as a significant threat to American social order. African-American children, because of their race, were perceived as being more inferior than Irish children. For this

reason they were segregated even in the House of Refuge from Caucasian children (Mennel, 1973, pp. 17-18).

The methods used for reforming juvenile delinquents were spelled out by one of the House of Refuge managers, judge John T. Irving: 'security', 'inspection', 'classification', 'constant employment', 'religious and moral instruction', 'allowance of food and clothing', 'space for exercise conducive to health', 'separation of the sexes', and 'attendance upon the sick'. At the same time judge Irving outlined according to increasing severity of noncompliance the methods of punishment for nonconforming inmates: 'privation of play and exercise', 'sent to bed supperless at sunset', 'bread and water for breakfast, dinner, and supper', 'gruel without salt for breakfast, dinner, and supper', 'camomile, boneset, or bitter herb tea for breakfast, dinner, and supper', 'confinement in solitary cells', 'corporal punishment', and 'fettters and handcuffs' (Pickett, 1969, p. 125).

In their own annual reports in the period between 1826 and 1856 the managers of the House of Refuge referred to the following as methods for achieving reformation: 'instruction of the mind and literary improvement', 'employment instruction', 'moral and religious instruction', 'steady discipline, order, regimen, routine of government', 'kindness and mercy', 'indulgences, distinctions, and rewards', 'indenture system', 'paternal government', 'punishment for misconduct', 'physical care', 'restraint', 'elimination of corrupting environment', 'proper classification and separation of offenders', 'provision of proper models', and 'cleanliness' (Pickett, 1969, p. 192).

The Expansion of Houses of Refuge

The city of Boston established its own House of Reformation in 1826, and Philadelphia a House of Refuge in 1828 (Mennel, 1973, p. 3-4). By midcentury there were eight cities with public institutions for the reformation of juvenile delinquents and by 1860 there were twenty Houses of Refuge or Reformation Schools in the United States (Hawes, 1971, p. 86).

The rhetoric and intentions behind the establishment of these institutions for young delinquents was identical across the country. After all, the leaders of rehabilitation institutions kept close links with each other (Hawes, 1971, pp. 27-29; Pickett, 1969, pp. 98-99). But it was not offenders only who were interned in Houses of Refuge or Reformation. Prominent citizens complained that institutions were admitting youth who had only committed crimes when, it was propounded, all children in need like the homeless should be eligible. In Boston, for example, the Reverend Joseph Tuckerman voiced this concern:

An authority should exist somewhere, and he to whom it is entrusted should use it, to dispose of lads who own no master, who regard no law, and who, if not in a legal sense vagrants, because there is a place in the city w ich they call their home, are yet known to be profane, intemperate, dishonest and as far as they may be at their age, abandoned to crime (Cited in Hawes, 1971, p. 80).

Thus, homeless or other children who were seen as potential criminals quite often ended in Houses of Refuge (Hawes, 1971, pp. 55-56).

Almost all Houses of Refuge employed similar methods for the reformation of their inmates: some education, industrial training, religious and moral instruction, rigid military discipline, reward for the obedient, and harsh punishment for the disobedient (Pickett, 1969, pp. 122-123). Legally, they came to be defined as residential schools, not prisons. The initial precedent was set by the Philadelphia House of Refuge with the *Ex Parte Crouse* case in 1838.

Pennsylvania courts decided that the state had the right to incarcerate children on the *parens patriae* legal doctrine (common guardian of the community) and that the commitment of Mary Ann Crouse to the House of Refuge was beneficial since it was a school for destitute children:

As to the abridgement of indefeasible rights by confinement of the person, it is no more than what is borne, to a greater or less extent, in every school; and we know of no natural right to exemption from restraints which conduce to an infant's welfare (Cited in Schlossman, 1977, p. 10).

Schlossman (1977) has pointed out that this decision amounted to equating Houses of Refuge and Reformation with "a residential school for underprivileged children, a horizontal expansion of the [then] fledgling public school system" (p. 10). Despite general praise, calls of dissatisfaction with these 'schools' could be heard before too long.

Voices of Discontent

In 1848 Elijah DeVoe, a fired assistant superintendent of the New York House of Refuge, published a polemic book entitled *The Refuge System, Or, Prison Discipline Applied to Juvenile Delinquents*. It was the first major public attack on Houses of Refuge as institutions using corporal punishment harshly and frequently. The book described them as places having the appearance and applying the methods of prison. In his assault on the New York House of Refuge, DeVoe (1848) spared no words:

...a stern, brutal, coercive government and discipline, entirely the opposite of that paternal establishment so amiable and ingeniously pictured in the 'annual reports' (p. 11).

Shortly after leaders such as J. B. Brown, House of Refuge assistant superintendent, F. A. Packard, editor of the *Journal of Prison Discipline and Philanthropy*, and Theodore Lyman, a Massachusetts leader, propounded the idea that reformatories for juvenile delinquents should

incorporate more education and industrial employment in their programs and that the new term 'reform school' should substitute the outdated expression 'House of Refuge' (Pickett, 1969, pp. 100-102, 175).

Despite delabeling attempts, reformatories had acquired the reputation of prison for youth by the 1850s. Schlossman (1977) has summarized the charges levelled against them:

Educational achievements were minimal; rehabilitative accomplishments were exaggerated; corruption was rife; political considerations intruded into the appointment process and inflated expenses; active proselytizing of Catholic inmates was pursued against the wishes of their parents; hardened and relatively innocent offenders mingled at will, negating the original purpose of the institution to prevent "contamination"; sex segregation developed homosexual tendencies, encouraged sex exploitation, and exacerbated emotional problems; vocational training programs amounted to no more than busywork or worse still exploitation of cheap child labor for private profit; and finally, incarceration provided a perfect setting for mutual instruction and reinforcement of the norms and techniques of criminal behavior (pp. 35-36).

The difference between claims and practices began to be exposed under careful scrutiny. Despite the verbosity of officials it became clear that reformatories for young delinquents were not based on the family model but on a strict military model (Rothman, 1971, pp. 234-235). This revelation brought some light to the escape attempts, successful and unsuccessful, rigid order, and many other problems that plagued reformatories since their inception (Hawes, 1971, pp. 46-48).

Almshouses, Poorhouses, and Insane Asylums

With the changing attitudes of American society toward poverty, almshouses and poorhouses began to be established in the 1820s and 1830s initially in New York and Massachusetts. Later they expanded to the rest of New England and subsequently to the mid-Atlantic and midwestern states. It was during the same period that charity funding shifted from

community to institutional patterns. In 1840 the state of Massachusetts had 180 almshouses, a number revealing the magnitude of the switch toward institutionalized relief (Rothman, 1971, pp. 183-185).

Almshouses and poorhouses quartered a variety of populations "from the aged, decrepit, and insane to abandoned children and expectant, unwed mothers" (Rothman, 1971, p. 196). Along with the rest of the poor, individuals with disabilities, either physical or mental, were interned in almshouses. The congregation of the most destitute social groups of American society in the poorhouses had the effect of further reinforcing institutionalization for anyone who came under the notice of authorities:

The population of the poorhouse itself became compelling evidence of the need for institutionalization. Its corridors were filled with first- and second-generation immigrants along with the broken, aged, diseased, crippled, and dissolute. In northeastern states especially, "immigrant" and "poor" became synonymous terms (Rothman, 1971, p. 290).

The prevailing characteristics of almshouses for the poor were pronounced by public figures to be "order", "discipline", and an "exacting routine" (Rothman, 1971, p. 188). The residents were supposed to conform to the rules, reside in an environment clean of temptations, get moral and educational instruction, and work if their health allowed it. Edward Livingston, a prison reformer, expressed what the purpose and methods of the almshouse ought to be for its residents: "[their] habits must be corrected by seclusion, sobriety, instruction, and labour" (Cited in Rothman, 1971, p. 189).

By the 1840s and 1850s nonetheless, most almshouses and poorhouses were found to be extremely inadequate. They were plagued by problems of overcrowding, deteriorating buildings, unsanitary conditions, underfunding, lack of personnel, and absence of apparent rehabilitation

programs. Various legislative committees that toured facilities in New York and Massachusetts over the years were dismayed by the state of almshouses and poorhouses (Rothman, 1971, pp. 195-202). In 1857 a New York state legislative committee reported that "[c]ommon domestic animals are usually more humanely provided for than the paupers in some of these institutions" but it was reluctant to give details publicly because they would "disgrace the state and shock humanity" (Cited in Rothman, 1971, p. 198).

During the same period with almshouses insane asylums were being founded. Mental health problems in the years between the American Revolution and Civil War were perceived to be increasing. Medical superintendents, even though ascribing to biological-hereditary models, thought that American society with its mobility, chaotic change, affluence, weakening of the family, and deteriorating city-life conditions was responsible for this increase. Since it would be difficult to change the debilitating conditions of American social organization, the solution was seen in segregating the insane (Rothman, 1971, pp. 109-129).

Before 1810 very few places existed for the care of the mentally ill. Only Virginia had a public asylum. New York and Massachusetts established institutions during the 1830s along with Vermont, Ohio, Tennessee, and Georgia. By 1850 almost all northeastern and midwestern states had insane asylums and by 1860 twenty-eight out of the thirty-three states in the Union had public facilities (Deutsch, 1949; Hurd, 1916).

Insane asylums were regarded as settings free from impairing influences where individuals with mental health problems could be 'cured'. Consequently, asylums were separate from the community so that they could be operated as 'well-ordered' institutions. 'Order', 'disciplined routine', and 'labor' were at the heart of the rehabilitative program. Patients had to submit to the

rules of the asylum more than anything else as a means of getting 'cured' (Rothman, 1971, pp. 137-138). One physician of the period wrote:

Nothing is so important as discipline and subordination, rules and order, in the government of an insane hospital (Cited in Rothman, 1971, p. 154).

What physicians and medical superintendents attempted to do was "to compensate for public disorder in a particular setting and to demonstrate the correct rules of social organization" (Rothman, 1971, p. 154).

Overall almshouses, poorhouses, and insane asylums had several characteristics in common with regard to the preferred setting and methods of treatment. Rothman (1971) has summarized these commonalities quite succinctly:

Supporters charged the almshouse with the same tasks that penologists assigned to the penitentiary and medical superintendents to the insane asylum. Founders of all three institutions insisted that the removal of deviants and dependents from the community was a prerequisite for recovery. They also agreed on the importance of a strict and regular internal routine to order inmates' lives. A disciplined and precise schedule would train them to withstand the temptations at loose in the society. To each group, incarceration seemed the most effective response to a social problem (pp. 189-190).

Establishment of Institutions for Individuals with Mental Disabilities

It was in late eighteenth century that establishment physicians formulated a diagnostic distinction between the 'mentally ill' and the 'mentally deficient'. Jean Esquirol was probably the first physician to define the latter as "arrested development rather than a disease process" (Wallin, 1955, p. 8). Even then 'idiocy' was generally seen as a homogeneous condition. It was not until the middle of the nineteenth century that it began to be regarded as a heterogeneous phenomenon (Kanner, 1964, pp. 87-108). With respect to the attitudes of the general population

during the colonial era and early nineteenth century, people with mental disabilities were seen as an integral part of the poor and were treated as such (Rothman, 1971, p. xiii).

No facilities for people with mental disabilities existed in the United States until 1818 when the Asylum for the Deaf and Dumb in Hartford, Connecticut set aside space for the accommodation of a few individuals. Church and philanthropic organizations played a large role in the establishment of institutions for persons with mental disabilities (Kanner, 1964, pp. 38-39, 72). Samuel Gridley Howe, a physician and one of the most ardent supporters of education for the 'feeble-minded' in nineteenth century America, is credited for being involved in the opening of one of the first state institutions. In 1846 he was appointed by the Massachusetts House of Representatives as commissioner to study the possibility of educating the 'idiots' of the state. In 1848 the committee chaired by Howe stated in its report:

The benefits to be derived from the establishment of a school for this class of persons, upon humane and scientific principles would be very great....The school, if conducted by persons of skill and ability, would be a model for others. Valuable information would be disseminated through the country; it would be demonstrated that no idiot need be confined or restrained by force; that the young can be trained for industry, order, and self-respect; that they can be redeemed from odious and filthy habits, and there is not one of any age who may not be made more of a man and less of a brute by patience and kindness directed by energy and skill (Cited in Kanner, 1964, pp. 41-42).

Despite ridicule of the Howe report by some the legislature provided funding that allowed the opening of a ~~section~~ at the Perkins Institution for training 'idiots'. In 1855 the experiment was considered a success and the Massachusetts School for Idiotic and Feeble-Minded Youth was founded in South Boston (Schwartz, 1956, pp. 135-149).

Another famous pioneer in the field of 'idiocy' was Edouard Seguin, a French citizen who immigrated to the U.S. in 1850. He worked with Howe for three months and he then made

valuable contributions to the organization of institutions for the 'feeble-minded' at Syracuse in New York, Randall's Island in New York, Ohio, and Connecticut. He also served as head of the Pennsylvania School for Idiotic and Feeble-minded Children (Davies, 1930, pp. 27-47).

By 1851 the New York State Asylum for Idiots had been opened in Albany, largely owing to a presentation by Howe to the New York Legislature. The asylum was later moved to Syracuse in 1855. Other similar institutions were founded during the following years: in 1855 in Philadelphia, the Pennsylvania Training School for Feeble-minded Children; in 1857 in Columbus, Ohio, the Institution of Feeble-minded Youth; in the period between 1858 to 1861 in Connecticut, the School of Imbeciles; in 1860 in Kentucky; and in 1865 in Illinois (Kanner, 1964, pp. 62-66).

When the first institutions were set up in the U.S., it was generally thought by specialists that 'idiocy' was a curable condition and institutions had mainly an educational function. Hervey B. Wilbur, in his first report as the superintendent of the Syracuse institution, wrote:

At the basis of all our efforts lies the principle that the human attributes of intelligence, sensitivity and will, are not absolutely wanting in an idiot, but dormant and undeveloped (Cited in Davies, 1930, p. 40).

The first institutions for individuals with mental disabilities appear to have been founded as educational institutions primarily. Edouard Seguin commented on the Syracuse institution:

The pupils remain in the institution as long as there is visible improvement and progress; for though nominally an asylum, it is really a training school (Cited in Davies, 1930, p. 40).

Institutions for 'idiots' were not isolated from the general efforts to establish common schools for the general population. They were created for those children unable to meet the standards of regular schools (Schulz, 1973, p. 69). Howe perceived them as an integral part of an educational system that would provide schooling for all American children:

It is a link in the chain of common schools - the last indeed, but still a necessary link in order to embrace all the children in the State (Cited in Davies, 1930, p. 40).

No children should be left "behind" as he put it in 1845:

...humanity demands that every creature in human shape should command our respect; we should recognise as a brother every being upon whom God has stamped the human impress; no one can say with justifiable pride homo sum! unless he can add too, nihil humani alienum a me puto!

Christianity demands that in the great march of civilization, the rear rank should not be left too far behind; that none should be allowed to perish in their helplessness; but that the strong should help the weak, so that the whole should advance as a band of brethren (Cited in Schwartz, 1956, p. 138).

The first schools for 'idiotic' youth were, therefore, primarily educational institutions in the beginning. As the hope for a 'cure' faded, settings were transformed into dominantly custodial institutions. The metamorphosis was almost complete by the 1870s (Davies, 1930, pp. 39-42; Rothman, 1971, pp. 237-295) when institutions had differentiated their functions to accommodate disabilities of different degrees of severity. They had a school section, an industrial section for work-training, and a residential asylum which comprised the largest section and principal function of institutions for people with mental disabilities (Kuhlman, 1940).

The fact that institutions for the 'feebleminded' were part of the general effort to establish formal schooling for American children is further illuminated by the connections between Samuel Gridley Howe and Horace Mann. The two have been referred to as "more than friends; blood brothers in reform is an apter description" (Schwartz, 1956, p. 94). Howe acted as "the first lieutenant of Horace Mann" (Schwartz, 1956, p. 94) when the latter was the Secretary of the Massachusetts Board of Education from 1837 to 1848.

Both Samuel Gridley Howe and Horace Mann, along with other leaders of the common school movement participated in the formation and reform of other newly created institutions.

Howe and Mann, for example, had joined the Boston Prison Discipline Society in the early 1840s preparing reports and giving speeches on penitentiaries that they had visited and studied (Schwartz, 1956, pp. 147-149).

Adams (1971) has pointed out that social services and the general social context cannot be compartmentalized into completely independent spheres:

Since social service cannot be divorced from social philosophy, which gives it its existence and impetus, and since social philosophy derives from the broad sphere of political thought and action, the development of services for the mentally handicapped has to be viewed in this wider context (pp. 16-17).

Despite the altruistic intentions in the establishment of institutions for people with mental disabilities it seems that the elements of custodianship, inherent in their organization and influenced by the general military model of the institutionalization movement, prevailed over the initial educational aims.

Emerging Themes

The themes emerging in this chapter are all relevant to the origins and establishment of special education in the United States and reveal the opposing influences of inherently contradictory elements. These themes are poverty, dependency and deviance, amelioration and social control, and institutionalization.

The change of social attitudes toward poverty, deviance, and dependency composed the initial basic block of contradictions. Whereas colonial era Americans viewed poverty, deviance, and dependency as a natural state of 'Divine providence', Americans of the nineteenth century perceived them as ill-products of dysfunctional families and society - that is, they gave primacy

to environmental influences. The former considered the unfortunate as brothers and sisters and attempted to solve problems, either through relief or punishment, within the community. The latter regarded the poor and the deviant as a threat to the existing social arrangements and endeavored to create formal institutional arrangements for their rehabilitation. The paradox is that while the dependents of colonial era were not blamed for their problems and were accepted as part of the community, they were fixed at the bottom of the social ladder. On the other hand, dependents in the nineteenth century were blamed for their situation and they were not accepted as part of the community unless institutionally reformed.

The perception by prominent citizens and powerful groups during the nineteenth century that the numbers of dependents and deviants were threateningly multiplying posed the challenges of amelioration and social control. At one end, there were motives of providing better settings for underprivileged children where they could be reformed and develop into 'respectable' citizens. At the other, there were incentives of protecting the larger society from the great social 'evils' of pauperism, dependency, and deviance. The representatives of these two perspectives intersected on their itinerary to meeting a common objective, that of alleviating and containing these social 'evils':

The ardent crusader for moral and social uplift and the frightened patrician could find common cause in seeking a solution to the situation. While the reformer might want to initiate a process which would transform the soul of society, the conservative elite would subscribe to almost any measure which might guarantee stability. Operating from different points of view, they would converge upon others whom they deemed in need of redemption - or a threat to their own security (Pickett, 1969, pp. 3-4).

The perceived need for individual and social remedy and societal stability was so immense that a unanimity had emerged by the second decade of the nineteenth century with respect to the mode of therapy and control.

The rationale behind the consensus was that individuals or groups in need of 'help' had to reside in an environment free of 'corrupting' influences where they could be successfully reformed. By consequence separation from the community in the manner of institutions appeared to be the obvious step:

Institutionalization at its moment of introduction, when attention was most focused upon it, received unanimous endorsement...[It] ruled out even the consideration of alternate strategies. Observers debated the wisdom of one regulation or another, or the degree of monopoly that ought to be given to indoor relief. But no one questioned its centrality (Rothman, 1971, p. 205).

Not only the centrality of institutionalization went unquestioned, its specific underpinning methods and doctrines were taken for granted as well. While publicly espousing a familial ideology caretakers put to practice a military model of rigid obedience, discipline, and regimentation intermingled with elements of moral, religious, and literary instruction. Institutions undertook to accomplish the objectives of social control and individual reformation:

The asylum was to fulfil a dual purpose for its innovators. It would rehabilitate inmates and then, by virtue of its success, set an example of right action by the larger society....The well-ordered asylum would exemplify the proper principles of social organization and thus insure the safety of the republic and promote its glory (Rothman, 1971, p. xix).

It is no mere coincidence that all the types of rehabilitative institutions and public schools were created during the same period, roughly between the 1820s and 1870s. In addition, it is no accident that all of them employed the military model as the basis of their organization in combination with moral, religious, and literary instruction.

It was during this period that training schools for the 'feeble-minded' were founded. Expectedly, they were organized around the same principles: separation, discipline, and training. Institutionalization and the particular military model for that matter were almost inevitable. Many of the leaders behind the establishment of training schools for 'idiots' were participants in a network of societies and organizations with ends ranging from public schools, almshouses, penitentiaries, houses of refuge and reformation to insane asylums. This network assured the diffusion of ideas and practices from setting to setting. It comes as no surprise, then, that training schools for 'idiots' and the 'feeble-minded' conformed to the general pattern of rehabilitative institutions of the era.

These schools were overwhelmingly residential and segregated from surrounding communities. Initially, when a 'cure' for 'idiocy' was seen as attainable, there was a preference for admitting higher-functioning individuals while 'helpless' cases were usually handled by almshouses and poorhouses (Adams, 1971, p. 21). The educational function of training schools for 'idiots' was, at that time, more pronounced than the regimentation, controlling function. As the hope for a 'cure' faded, an increasing number of lower functioning individuals were housed in specially created asylum sections. A concurrent shift of objective and function of institutions occurred from education and training to custody.

This ~~switch~~ to a mainly custodial function was characteristic of all rehabilitative institutions and it was almost complete by the 1870s. The contradiction between the educational and social control functions was resolved in favor of custodial arrangements:

...the founding ideology placed such a heightened value on traits like obedience, respect for authority, punctuality, and regularity that superintendents...neglected considerations of humane and gentle management. The balance of moral treatment tipped to the side of repression, not indulgence (Rothman, 1971, p. 270).

Criticisms were levelled that "[i]n the end, the institutions did not fulfil either the modest or grandiose hopes of their founders" (Rothman, 1971, p. xix), and they continued to exist well into the twentieth century despite charges that they contributed to dependency and deviance (Pickett, 1969, p. 181). The influx of new immigrants after the 1870s provided a framework to perpetuate their existence and "incarceration became first and foremost a method for controlling the deviant and dependent population. The promise of reform had built up the asylums; the functionality of custody perpetuated them" (Rothman, 1971, p. 240).

CHAPTER 4

American Education From the Civil War to 1990

After the traumatic experience of the Civil War, American society embarked upon reconstruction and healing the wounds of animosity between North and South. Reconciliation was not uncomplicated and southern states resented the repeated attempts by north-eastern states throughout the late nineteenth and twentieth centuries to define the political, social, and educational agenda in the country (Cremin, 1988). Industrialization, urbanization, and centralization started becoming defining characteristics of American society. Old conflicts continued to persist and new contradictions appeared. They all influenced the direction of formal education as public schools in the United States increasingly became a means for various social groups to advance their discrepant interests.

General Background

Two concurrent major social trends throughout the remainder of the nineteenth and twentieth centuries were successive waves of immigration and urbanization. Between 1876 and the 1980s the U.S. population increased from approximately 46 million to 226 million. Some 40 million people during that period entered the country as immigrants (Ebner, 1981-82). The major sources of immigration were: between 1880 and 1924 mainly from southern, central, and eastern Europe; between 1930 and 1950 primarily from north western and central Europe; during the 1960s predominately from Canada, the West Indies, and Latin America (Bogue, 1985). Nowadays

most of the immigrants coming to the U.S. originate from Third World countries (Reimers, 1985).

Immigrants faced an intensive acculturation effort in public schools. For a long time it was assumed that America was a 'melting pot' (Fairchild, 1926) where immigrants lost their particular cultural identities, whether ethnic, linguistic, or religious. Studies in the 1960s and 1970s (e.g. Glazer & Moynihan, 1963; Lenski, 1961; T. L. Smith, 1978), nevertheless, have indicated that despite a consolidated American identity ethnic and religious groups continued to have unique identities as well. T. L. Smith (1978) has proposed the metaphor of 'kaleidoscope', in place of the 'melting pot', to signify the fact that many social groups view themselves as having American and particular ethnoreligious identities. The metaphor of 'kaleidoscope', in contrast to the 'melting pot' one, manifests a dynamic quality where social groups can see themselves as possessing various cultural characteristics depending on the context and the situation. With the relatively recent immigration of more variegated cultural groups, the metaphor of 'kaleidoscope' and the concept of 'multiculturalism' (Pozzetta, 1991; L. E. Wallace, 1990) have acquired a renewed and more substantial significance for American society and education.

In addition to acculturation, many immigrants of differing cultural background encountered the social stigma consequential to intelligence and psychological testing. Psychological testing has been firmly linked to educational tracking, either vocational or remedial, and it has been documented as carrying with it a significant element of social control (Milofsky, 1989). The words of Henry Goddard during a lecture at Princeton in 1919 provide a graphic example:

...the fact is [a] workman may have a ten year intelligence while you have a twenty. To demand of him such a home as you enjoy is as absurd as to insist that every laborer should receive a graduate fellowship. How can there be such a thing as social equality with this wide range of mental capacity? (Cited in Bowles & Gintis, 1976, p. 104).

Intelligence testing has grown phenomenally during the twentieth century and it is now robustly entrenched in American schools (Milofsky, 1989).

Shortly after the Civil War, a large number of rural residents started moving into cities and most newly arrived immigrants were settling in urban centers as well. In 1890, 30% of the population in the U.S. lived in cities, in 1920 over 50%, in 1950 almost 66%, and by the 1980s 75% (Ebner, 1981-82). Thus, the country became a largely urbanized and industrialized society approximately five generations after its establishment as an independent republic.

With metropolitanization education faced the challenges of providing more social discipline and general and specialized knowledge. Intellectual and cultural elites were formed and consolidated, claiming special expertise and jurisdiction over certain domains of knowledge (Bledstein, 1976; Haskell, 1977, 1984; Olson, & Voss, 1979).

The Federal government became extensively involved in education only after World War II and several presidents used it to launch major social-political reforms from preparing Americans to enter World War I (Cremin, 1988, pp. 337-345), meeting the Sputnik Soviet challenge with the enactment of the *National Defense Education Act* in 1958 (U.S. Department of Education, National Center for Education Statistics, 1990, p. 326), promoting racial desegregation, declaring 'war on poverty' (Cremin, 1988, pp. 255-272) and 'war on drugs' to 'excellence' in education (National Commission on Excellence in Education, 1983). The seeds planted by the ideas of the Founding Fathers, which had sprouted during the nineteenth century

with all their contradictions, grew to form the branches of a distinctively American education system.

The Progressive Influence

I believe that education is the fundamental method of social progress and reform
(John Dewey cited in Cremin, 1988, p. 1).

After the Civil War there were disconnected and episodic movements to influence American education such as: the introduction of vocational instruction in the spirit of utilitarianism (Lazerson & Grubb, 1974); the separation of schools from politics by having professional administrators running schools (W. A. Bullough, 1974); the introduction of elements from philosophy, psychology, and pedagogy to form a science of instruction (Suppes, 1978); and the creation of schools as social centers for community building, industrial preparation of workers, and for citizenship development (Stevens, 1972; Wirth, 1972). It was not until the 1890s that these movements converged in the realm of progressive education. A major milepost in this convergence was Joseph M. Rice's (1893) book *The Public School System of the United States*. In his extensive survey of American public schools he described rote and mindless teaching, administrative incompetence, political manipulation, and public indifference.

John Dewey, perhaps the most prominent progressive educator, propounded at the turn of the century that schools are the primary instrument of social change, harmony, and progress. In fact, he thought that schools are the only means of programmatically bridging social differences and minimizing conflict between social groups (Dykhuizen, 1973). His own words in 1897 demonstrate clearly the ideas of planned progress through education:

By law and punishment, by social agitation and discussion, society can regulate and form itself in a more or less haphazard and chance way. But through education society can formulate its own purposes, can organize its own means and resources, and thus shape itself with definiteness and economy in the direction in which it wishes to move (Cited in Cremin, 1988, p. 151).

Consequently, he thought that schools should reflect society and that they should have a child-centered pedagogy (Dykhuizen, 1973).

Other leading progressive educators were Jane Addams, George S. Counts, Harold Rugg, John L. Childs, R. Bruce Raup, Goodwin Watson, Jesse Newlon, Harold F. Clark, and F. Ernest Johnson. They all supported the idea of using schools to change society in an orderly fashion and they were involved in the liberal attempt to reconstruct American education during the depression years (Bowers, 1969).

Progressive educators formed organizations such as the *National Society for the Promotion of Industrial Education* in 1906 and the *Progressive Education Association* in 1919. The former was instrumental in lobbying Congress to pass the *Smith-Hughes Act* in 1917 authorizing grants to States for vocational education (U.S. Department of Education, National Center for Education Statistics, 1990, p. 325). The main goals of the progressive movement before World War I were vocational education, efficient school administration, development of a science of instruction, and the professionalization of teaching. In the 1930s progressives collaborated with social workers, religious leaders, and government bureaucrats in their attempt to solve the problems of American youth through high schools (Graham, 1974).

The progressive movement was pluralistic and contradictory in nature. It was pluralistic by drawing its leaders from business, labor, philanthropy, politics, farming, and academia. It was

contradictory by embracing equality among races while conceding to the practice of segregated schools for African-Americans (Cremin, 1988, p. 228).

The Protestant Influence

Most protestant educative organizations continued to work within the realm of organized protestantism after the Civil War. In fact, there was a revitalization of the evangelical front during the late nineteenth and early twentieth centuries (Hopkins, 1940) by leaders such as Washington Gladden, Henry Ward Beecher, Theodore T. Munger, William J. Tucker, Josiah Strong, Lyman Abbott, Walter Rauschenbusch, William S. Rainsford, and Richard T. Ely. They formed or influenced organizations such as the *American Congress of Churches* in 1884, the *American Institute of Christian Sociology* in 1893, the *Open and Institutional Church League* in 1894, the *National Federation of Churches and Christian Workers* in 1901, the *American Economic Association*, the *League for Social Service* and its successor the *American Institute for Social Service*, the *Evangelical Alliance for the United States*, the *Ethical Culture Society*, the *Brotherhood of the Kingdom*, and the *Federal Council of Churches of Christ in America* (Cremin, 1988, pp. 25-28).

Protestantism had to face renewed challenges after the Civil War with the spread of urbanization (Abell, 1943). More specifically, it had to deal with modernism and modern science (Gauthen, 1962; Hutchison, 1976; Martin, 1986) and industrial capitalism and its class inequities (Handy, 1966; H. F. May, 1949). Washington Gladden in particular published extensively on the problems posed to protestantism by industrialism and urbanization (e.g. Gladden, 1876, 1894, 1899, 1902). Along with other protestant leaders he proclaimed the liberal ideology of the 'Social

Gospel'. According to this ideology, industrial and metropolitan order would have to be infused with protestant liberal values in which capital and labor would coexist in social justice and peace. Violence had no place in such a vision (Dorn, 1967; Handy, 1966).

Gladden (1894) went on to declare a close relationship between christianity and social science. He described it as "the relation of an offspring to its parent. Social science is the child of Christianity. The national and international associations that are so diligently studying the things that make for human welfare in society are as distinctly the products of Christianity as is the American Board of Missions" (p. 214).

While Gladden's 'Social Gospel' seemed to have a modernist outlook, Dwight L. Moody and Ira D. Shankey became the fathers of christian fundamentalism. They represented the branch of protestantism that refused to adjust to modern conditions and opposed the newly proclaimed liberal ideas. They established or influenced organizations such as the *Bible Institute*, the *Student Volunteer Movement*, the *Chicago Evangelization Society*, the *Evangelical Teacher Training Association*, *Mount Hermon School*, and the *World's Christian Fundamentals Association*. The expressed mission of these institutions was both christian conversion and education (Marsden, 1980; Sandeen, 1970).

A middle position, best exemplified by Niebuhr (1956), was taken by other protestants. Reinhold Niebuhr was a minister of the Evangelical Synod during the 1920s and 1930s. In *Leaves From the Notebook of a Tamed Cynic* published in 1929, he criticized both the advocates of the 'Social Gospel' and christian fundamentalism. He claimed that the former sought to adjust christian values to exploitation and capitalism leaving religion devoid of faith, while the latter

were so out of touch with modern American culture that they ended up serving exploitation as well.

Of the three directions taken by late nineteenth and early twentieth century protestantism, Gladden's 'Social Gospel' had a similarity with ideas promoted by the progressive movement. They both shared a common emphasis on social harmony and peace and an aversion to conflict and violence; the former by using social science to infuse protestant values into the industrial and urban social order, and the latter by using education and public schools to plan a desired path of progress.

Trends in Public Schools

After the Civil War the common school was introduced in the southern United States. Southern Caucasian-Americans, nonetheless, came to resent and violently oppose a school system that they perceived as an imposition of ideas and practices from the northeast (Cremin, 1988, pp. 212-223).

At the turn of the century the progressive movement was instrumental in making formal schooling a more desirable commodity. They continued to use the same techniques that the 'friends of education' had used a few decades ago, namely extensive campaigns, coalitions, and informal associations through state, regional, and national professional organizations. Consequently, school enrollments in kindergarten, primary, and secondary schools increased sharply in the period between 1900 and 1940 (Meyer, Tyack, Nagel, & Gordon, 1979-80; Rury, 1985).

By 1918 all forty-eight states in the Union had enacted compulsory schooling laws between the ages of seven to eight and fourteen to sixteen (Landes & Solmon, 1972). Most states began to enforce these laws in the 1920s and 1930s (Bernert, 1958). It is hard to say whether it was enforcement of laws or acceptance of schooling that was responsible for the rapid increase in enrollment. Quite likely, legislation simply confirmed what was already an accepted practice. The statistical trend of American children between the ages of seven and thirteen shows that 95% in 1940, 99.5% in 1960, 99.3% in 1980, and 99.6% in 1990 were enrolled in various schools. In terms of children between the ages of five and seventeen the indicators were 71.9% in 1899-1900, 84.4% in 1939-40, 82.2% in 1959-60, 86.7% in 1979-80, and 88.5% in 1988-89 (U.S. Department of Education, National Center for Education Statistics, 1991, pp. 15, 47). The vast majority of children since the 1930s, hence, have been enrolled in schools and most of them, approximately 90%, in public schools (U.S. Department of Education, National Center for Education Statistics, 1990, p. 12). In terms of total number of years of formal schooling, a look at the statistics shows that the average American over twenty-five years of age completed 8.6 years of schooling by 1940, 12.5 years by 1980, and 12.7 years by 1989 (U.S. Department of Education, National Center for Education Statistics, 1991, p. 17).

American public schools became more centralized, bureaucratized, and metropolitanized during the twentieth century. The number of local public school districts was reduced from 117,108 in 1939-40 to 15,747 by 1983-84 and remaining at approximately the same number in 1989-90 (U.S. Department of Education, National Center for Education Statistics, 1991, p. 93). According to Cremin (1976) the result has been more similar schools using mass-produced textbooks and the prominence of national and state testing programs. In addition, national reports

sponsored by philanthropic foundations and professional associations have become common place. The increasing involvement of the federal government since World War II has played a significant role in the standardization of schools. The financial contribution of the federal government to education increased dramatically. From 1.8% of the total public elementary and secondary school revenues in 1939-40 it went up to a record high of 9.8% in 1979-80. In 1988-89 it stood at 6.2% after a period of stable decline during the 1980s (U.S. Department of Education, National Center for Education Statistics, 1991, p. 147).

The public high school has become the dominant form of secondary education. This trend started back in the 1880s when enrollments surpassed those in private secondary schools. From 1890 to 1930 the public high schools were doubling their enrollments every decade (U.S. Bureau of the Census, 1975, pp. 368-369).

In terms of the organization of graded schooling the eight-grade elementary and four-grade high schools predominated until the end of the nineteenth century. This arrangement, though, was criticized for being incompatible with child and adolescent development. A period of experimentation followed where elementary and secondary schooling was divided into seven-four, nine-four, eight-three, or eight-five forms, to be replaced by six-six and six-three-three systems. Finally the four-four-four form became predominant during the 1950s and 1960s (Barton, 1976; Krug, 1972).

The residual category of the nineteenth century 'supplementary' schools came to be known as 'special' schools during the twentieth century. Established initially under religious and charitable authority they became increasingly part of the public school system either in totally or partially segregated settings (Cremin, 1988, p. 550).

American Education as a Ground Of Opposing Interests

Should individualism...synonymous with American liberty remain the dominant motif of church and school teaching, or should it be leavened by the communal emphasis at the heart of Washington Gladden's Social Gospel and John Dewey's social philosophy? Should equality mean the cultivation of the most talented in the nation's colleges and universities, or the nurturance of the average, or the compensatory encouragement of those long discriminated against? Should comity lead the agencies of popular communication to seek the largest general audiences of the greatest number of specialized audiences? What should be the proper balance between popular preference and elite taste in a publicly supported library or museum? Or between local preference and national taste? In sum, how should the legitimate but often unclear and conflicting demands of liberty, equality, and comity be resolved in and through programs of education? And who, in a nation where education had moved to the heart of politics, should do the resolving? (Cremin, 1988, p. 13).

With the advent of urbanization and metropolitanization the conflict to define American education and public schools between contradictory social groups became ever more obvious and political in the twentieth century (Welter, 1962). There was an expanding effort from various interest groups to appropriate schools. For example, the Farmer's Alliance was pressuring the schools to include in their curriculum the history of the labor movement and the poorer classes. The National Association of Manufacturers, in contrast, was lobbying schools to teach capitalist values (Cremin, 1988, p. 651) and avoid any dialogue or controversial subjects. An industrialist pressuring a school in the 1930s wrote in his letter to the school superintendent:

*I would be interested in having you advise me just why such subjects - as **Pacifism**; **Disarmament**; **Socialism**; **Communism**; **Soviet Russia**; **Differences in religious belief**; **Birth control**; etc. - should be discussed in a high school or any public school? What is the idea or need of such discussion? (Cited in Selakovich, 1967, p. 91).*

In the early 1940s through the 1960s many nationalist groups sprang up around the country to get communism and communists out of the schools. The American Legion wanted

schools to teach an unquestioning patriotism and ventured to oust all 'subversive' influences (Tanner, 1991). At times, criticism of the public school curriculum almost reached the point of claiming it was the product of a communist plot. Harold Rugg (1941), a progressive and author of textbooks for several decades, summed up the criticism of his and others' books by patriotic groups in the late 1930s:

The books were denounced as "subversive...un-American." It was said they "undermine patriotism"..."twit the Founding Fathers"... "have an alien ideology"... "plan to substitute a new social order for our American Government"... "would regiment private enterprise"... "debunk our great heroes of the past" (p. 498).

Apart from industrialist and nationalist groups, various christian denominations wanted public schools to teach the theological and ethical bases of christianity. The Roman catholics especially challenged in many ways the established preeminence of protestant teachings in schools (Kane, 1955) simply by the sheer numbers of catholic immigrants entering the United States. The catholic population in America was 6,259,000 in 1880, 16,363,000 in 1910, and 19,828,000 in 1920 (Cremin, 1988, pp. 126-127) while in 1980 it had increased to 50,450,000 (U.S. Department of Commerce, 1984, p. 51).

Conflict was not confined to protestants and catholics. Modernist and fundamentalist protestant denominations were in friction since the turn of the century for some control over what was taught in public schools. The Scopes trial in Tennessee (Gatewood, 1969; Ginger, 1958) regarding the teaching of Darwinian evolution in the public school biology curriculum is an example of a controversy that is very much alive today.

The conflict between various religious denominations has resulted in a fragmentation of American education into public, protestant, catholic, and Jewish schools. Pluralism, as in many

other aspects of American life, has also become a force in education. According to Cremin (1988), the influx of immigrants from many Third World countries will probably guarantee an accentuation of educational pluralism. In addition, metropolitanization across the world accompanied by rapid political, cultural, and technological change will likely promote the feature of transnationality in the education systems of many countries, the U.S. included (p. 14).

Despite strife among various social groups to define education, a major change in American and Western education generally has been effected during the twentieth century; namely a shift from a paradigm of study to a paradigm of instruction. The former refers to an education based on a varied and reflective life while the latter to an education used for certain social, religious, or political purposes. The enactment of compulsory schooling legislation has apparently been influential in accelerating this shift (McClintock, 1971).

Teachers and Curricula

The gender composition of the teaching profession has always been mainly female since the midnineteenth century and became increasingly so during the first half of the twentieth century. According to statistics, 66% in 1890, 86% in 1920, 79% in 1950, and 67% in 1976 of the teachers in primary and secondary schools were female (W. V. Grant & Eiden, 1980, p. 11, 56).

The entrance of an increasing number of students between 1900 and 1940 altered both the structure and the curriculum of high schools. The structure became increasingly differentiated along racial (Weinberg, 1977), ethnic (San Miguel, 1987), class (Robinson, 1986-87), gender (Krug, 1972), and 'intelligence' (P. H. Du Bois, 1970) lines. The high school curriculum from

1890 to 1910 was comprised of courses in Latin, French, German, English literature, history, algebra, geometry, physics, and chemistry. By 1940 the curriculum had expanded to include subjects such as general science, manual training, home economics, bookkeeping, or typing (Cremin, 1988, p. 546).

During the period following World War II, as the federal government extended its role in education, matters pertaining to course content, curriculum, and school materials were increasingly being made at the national level. The groups that usually made these decisions were sponsored by the federal government or national professional organizations (Spring, 1976).

Meanwhile the functions of discipline and social order and control remained at the core of American public schools. Joseph M. Rice wrote in 1893 describing a New York city teacher's obsession for obedience:

During several daily recitation periods, each of which is from twenty to twenty five minutes in duration, the children are obliged to stand on the line, perfectly motionless, their bodies erect, their knees and feet together, the tips of their shoes touching the edge of the board in the floor. The slightest movement on the part of the child attracts the attention of the teacher. The recitation is repeatedly interrupted with cries of "Stand straight," "Don't bend the knees," "Don't lean against the wall," and so on. I heard one teacher ask a little boy: "How can you learn anything with your knees and toes out of order." (Rice, 1893, p. 98).

And Frank Freeman, an influential American educator, declared in 1924:

It is the business of the school to help the child to acquire such an attitude toward the inequalities of life, whether in accomplishment or in reward, that he may adjust himself to its conditions with the least possible friction (Cited in Bowles & Gintis, 1976, p. 102).

Herbert Spencer, the philosopher and sociologist who in the nineteenth century provided the basis for reconciling Darwinism and christian belief, thought that education should fulfil the following five objectives: teaching self-preservation; learning how to secure the necessities of

life; acquiring skills for rearing children; teaching proper social and political relations; and learning how to gratify (culturally) tastes and feelings (Cavenagh, 1932). According to Cremin (1988) the functions of public schools during the twentieth century have been utilitarianism and vocationalism, literacy, republicanism, Americanization of immigrants and patriotism, teaching of common values and building a shared American identity, social mobility, and teaching other nonutilitarian knowledge (pp. 644-675).

Americanization and a common national identity had always been two of the central emphases of public schooling in the U.S. and they were carried over in the twentieth century (Carlson, 1975). These two functions were considered to be essential because of the large numbers of immigrants entering the country. In 1921 and 1924 Congress passed immigration legislation to curtail new immigration because it was thought to be inferior. In 1921 the department of Immigrant Education was created to teach immigrants English, personal hygiene, and middle-class values. Quite often it reinforced a dislike of the immigrants' own culture in return for espousing American culture (Cremin, 1988, p. 237).

The trend of utilitarianism and vocationalism became ever stronger because of the acceleration of industrialization after the Civil War. The number of farmers in 1900 decreased to 37.7% of the work force from 51.6% in 1870. The number of wage earners in manufacturing increased from 2.7 million in 1880 to 8.4 million in 1920 (U.S. Bureau of the Census, 1975, I, 138). Consequently, agricultural and technical schools continued to multiply around the country. Federal involvement after 1945 eventually made the efficiency of industrial society by the proper selection and channelling of national human power resources a central feature of American schooling (Spring, 1976).

The launch of the Soviet satellite Sputnik in the late 1950s challenged the federal government to recruit education for military development through the production of more scientists and engineers. The *National Defense Education Act* (PL 85-865) in 1958 dealt in one stroke with cold-war concerns, the development of new national curricula, and the problems of federal aid to education (Spring, 1976).

Quite similarly the recent technological challenge by Japan has already compelled many American politicians, business leaders, and educators to publicize the inadequacies of public education (Ramirez & Boli, 1987). Ironically, the proposed solutions for elementary and secondary education have been based on the old recipes of 'basics' (reading, writing, mathematics, and science) and for higher education on 'excellence' (in fine print: directing resources toward best or more affluent students and profitable, technologically advanced science areas). The U.S. federal government is currently in the process of enacting even more homogenous educational policy to meet perceived challenges to American technological and world-power interests. Some of the federal education-related legislation that has been passed during the past decade includes the *Education for Economic Security Act* (PL 98-377) in 1984, the *Omnibus Trade and Competitiveness Act of 1988* (PL 100-418), the *Education and Training for a Competitive America Act of 1988* (PL 101-26) (U.S. Department of Education, National Center for Education Statistics, 1990, pp. 330, 331, 332), and the *Excellence in Mathematics, Science and Engineering Education Act of 1990* (PL 101-589) (U.S. Department of Education, National Center for Education Statistics, 1991, p. 346). These laws appear to lead to the logical conclusion of the utilitarian and vocational trend in American education.

Pariahs

Despite claims to having 'common' schools, segregation was well entrenched in American education throughout the late nineteenth and twentieth centuries. There was legal separation of African-American children in the south and aboriginal children in the west, and *de facto* segregation of African-American and Puerto Rican children in the north, of Chicano children in the south-west, of Asian children in the west, and of inner city children of low socioeconomic background throughout the U.S. (Cremin, 1988, pp. 551-552).

During the twentieth century, discrimination in American society was, and in general still is, present. African-Americans attained citizenship in 1868 with the ratification of the Fourteenth Amendment but they were still trying in the 1960s and 1970s (or even today as witnessed by the Rodney King case and the consequent L.A. riots in 1992) to achieve full civil rights. Aboriginals were granted citizenship in 1924 but still face limited rights because of social prejudice. Other racial groups too faced legalized discrimination as late as the early 1940s when Japanese-Americans were interned during World War II. Women acquired full citizenship and suffrage rights in 1920 with the ratification of the Nineteenth Amendment. Even many Caucasian-Americans of differing ethnoreligious and linguistic background were faced with discrimination (Veda, 1980).

By the 1870s African-Americans had formed their own protestant denominations which functioned as their sole source of community and education. And as early as the turn of the century they saw the first results of their efforts; African-American teachers and clergymen who were set on using education for advancing their own interests, going far beyond the intent of sponsors from the north right after the Civil War (W. E. B. Du Bois, 1900).

In the south, segregation of African-Americans in schools remained legal until the 1954 Supreme Court decision in the case of *Brown v. Board of Education*. This decision declared the unconstitutionality of separation of African-Americans in different schools:

We conclude that in the field of public education the doctrine of 'separate but equal' has no place....Separate educational facilities are inherently unequal (Brown v. Board of Education, 1954).

Despite the Supreme Court decision there was widespread negligence in implementing its letter and spirit for almost two decades (Kluger, 1976). Consequently, the *Civil Rights Act of 1964* was enacted by the federal government largely in response to the civil-disobedience rallies by African-American leaders such as Martin Luther King or the secessionist calls of others such as Malcolm X (Cremin, 1988, pp. 123-125, 263). The federal government succeeded to a certain degree in achieving school desegregation of African-Americans as late as 1972, as depicted by 1972 enrollment statistics in the United States Commission on Civil Rights (1977) report. The strategy employed was a combination of using funding or its withdrawal upon noncompliance, and court rulings (Cremin, 1988, p. 264). Other social groups later adopted similar arguments as in the *Brown* case to further their interests. One of these groups has been the advocates of people with disabilities whose advocacy and scholarly literature cites the *Brown* decision as the basis of their legal argument (e.g. Stainback, Stainback, & Bunch, 1989b).

By 1870 a widespread network of almshouses, sunday schools, asylums, reformatories and other similar institutions was being operated by philanthropic organizations. The overt reasons for the establishment of this network appeared to be 'charitable benevolence' and 'christian love' but part of the motivation was not altruistic. Charles Loring Brace (1872), the founder and executive secretary of Children's Aid society in New York city wrote in the 1870s

that the neglected children of the "outcast poor" (p. 224), primarily immigrants, were the most threatening members of the "dangerous classes" (p. 224). He projected the impression that unless something was immediately done the more affluent classes would be overwhelmed. Even progressives such as Breckinridge and Abbott (1912) who viewed the family as the primary nursery of children never trusted the immigrant family:

If these children of illiterate immigrant parents cannot be placed in school soon after their arrival in this country, the way to delinquency through dependency is sure to be open to them (p. 65).

In the arrangement of rehabilitative institutions lies the contradiction of progressives espousing the importance of familial education when advocating institutionalized treatment of delinquent, disadvantaged, poor, or disabled children and youth. This contradiction is further expressed in the literature as to the reasons of progressives for 'child saving' in the nineteenth and twentieth centuries. Bremner (1956) sees these reasons as generally beneficial, Platt (1969) as essentially repressive, Schlossman (1977) as contradictory with regard to rhetorical intentions and outcomes, while Tiffin (1982) as ambivalent with respect to the dilemma of familial versus institutional care.

The rehabilitative special schools expanded rapidly during the twentieth century. Many of them were residential, expensive, and chronically underfunded resulting in children being ignored or treated poorly by untrained personnel. Funding became more readily available for special classes with the *Elementary and Secondary Education Act* (PL 89-10) of 1965. This federal legislation authorized financial and other assistance to school districts with large numbers of students from poor families (U.S. Department of Education, National Center for Education Statistics, 1990, p. 327).

In 1966, however, the Coleman (1966) report found that equality of opportunity in terms of input, such as facilities, teacher salaries and expenditures per student, were roughly the same for most public schools. In terms of output, using achievement-test survey data, it was revealed that minority children were one to two years behind Caucasian middle-class children in grade one, and three to five years behind by grade twelve. Schooling, thus, increased the disparity instead of decreasing it. It was concluded that attention should be focused on factors external to schooling such as family background, poverty, or neighborhood segregation. In addition, Coleman's report paid attention to the significance of internal variables such as locus of control, aspiration, and cognition.

In spite of the various government, legislative, judicial, and school agency attempts to reduce inequality of educational opportunity the fact remains that segregation is very much a reality of American society and educational institutions. Gunnar Myrdal (1944) in his book *An American Dilemma: The Negro Problem and Modern Democracy* described a system of valuations that he called 'American creed' as "liberty, equality, justice, and fair opportunity for everybody" (p. xlviii). According to Myrdal this 'American creed' was derived from christianity, the Enlightenment, the English legal tradition, and American constitutionalism. He argued that even though most Americans adhere to it, the 'American dilemma' is the contradiction between this creed and the failure to accord elemental civil and political rights to African-Americans.

In much the same way the 'American dilemma' applies to other social groups who have been historically denied civil and political rights. Whether it be aboriginal nations, racially and culturally differing immigrants, or individuals with disabilities, it remains to be seen what the outcome of the dilemma may be.

Emerging Themes

The emerging themes in this section have been grouped in four categories: general social context, educational features, objectives of public schools, and consequent implications.

With respect to the general social context, the growth of cities and immigration were two major social trends in American society. American cities became metropolitanized encompassing a variety of cultures as a result of continuing immigration. Social segregation among various social groups continued to be part of the American reality in the twentieth century. Racial, ethnic, religious, and linguistic factors were important reasons for this segregation. In spite of a large degree of social segregation a dynamic interaction among groups had a strong presence. T. L. Smith's (1978) metaphor of the 'kaleidoscope' conveys the interaction, dynamism, and variety of American life and education.

Education entrenched itself in the twentieth century as "the characteristic American mode for reform" (Cremin, 1988, p. 316). It became standard practice for Presidents such as Johnson, Nixon, Ford, and Carter to contribute substantial funding to implement reforms through educative efforts. Only Ronald Reagan appointed T. Bell as secretary to the Department of Education in 1981 with the objective of abolishing the Department and drastically reducing federal financial assistance. This trend, however, has been reversed the last few years with the result that between 1980 and 1990 federal financial education-related obligations have increased by approximately 17% after adjustment for inflation (U.S. Department of Education, National Center for Education Statistics, 1990, p. 332). In any case the U.S. Department of Education has not been abolished. On the contrary, it has played an influential leadership role in the educational reforms of the 1980s.

The importance American Presidents placed on education is a strong indication that its definition occurred in a background of conflict. All major social groups of American society tried to influence the direction of schools: industrialist and business organizations, labor unions, christian denominations, nationalist and patriotic groups, politicians, and educators.

As a counter force to conflict, discipline and social order persisted as important themes in American society and education. The progressive and protestant influences provided a basis for seeking 'consensus' by enhancing a philosophy of social harmony and aversion toward violence. Washington Gladden's 'Social Gospel' used social science as an extension to christianity to instill protestant values into the industrial and urban social order. The progressives on the other hand tried to use public schools as the means for designing an avenue of planned social advancement. Both influences were implicated in the development of reformatory and rehabilitative institutions manifesting the contradictory motives of social control and social amelioration.

In terms of educational features, 'popularization' and 'multitudinousness' persisted in the twentieth century with the addition of 'politicization' - "the increasingly direct harnessing of education to social ends" (Cremin, 1988, p. 650). Utilitarianism and vocationalism became prominent features of American education serving the continuing demands of industrial, technological, and military development. At the same time developments such as increasing enrollments, compulsory schooling legislation, and the increasing involvement of the federal government effected a centralization, bureaucratization, and standardization of schools.

The objectives and functions of American public schools continued to be similar as in the past but evolving in the late nineteenth and twentieth century to adapt to the changing realities.

These objectives are: Americanization of immigrants and nationalism-patriotism; supporting republican government; social control and order; other general and specialized knowledge; social mobility and advancement (Cremin, 1988); training a labor force congruous with the realities of a capitalist economic system; utilitarianism and vocationalism in the service of industrialization, technological development, and military growth (Spring, 1976); and by implication exclusion of social groups and individuals from mainstream schools on the basis of race (mainly in southern states for the first half century) and ability. With respect to students with disabilities, they remain the last social group to be explicitly and openly excluded from the mainstream of American education.

With regard to the consequent implications themes, similar contradictory social developments and forces as in the pre-Civil War era continued in American education. There were conflicting visions of liberalism and racism, of the ideal citizen and the conformist citizen, of equality and prejudice, of social mobility and class privilege, of republicanism and social control, of inclusion and exclusion.

A few new contradictory elements, however, appeared in the educational scene. On the one hand the federal government increased its role in education. Public schools were recruited for the preparation of the U.S. to assume its position as a leading world power - thus the emphasis on technological and military development. Spring (1976) has suggested that public schools have acquired rapidly the role of institutions of social sorting and control for the national state since 1945. This function has completed the similarity of the U.S. with other western countries regarding the purposes of compulsory schooling (Ramirez & Boli, 1987).

On the other hand, American education has become more pluralistic than in the past. There are currently a number of social groups from the business, state and federal government, citizen advocacy, education, and special-interest group sectors that are trying to influence educational practices. In addition, the influx of new immigrants from the third world may increase the cultural and ethnic diversity. As the notion of a christianized America is becoming outmoded (McLoughlin, 1978) so may the concept of uniform American public schools. It will all depend on the outcome of the 1980s' educational reforms.

CHAPTER 5

Special Education in Late Nineteenth and Twentieth Centuries

After the Civil War, institutions for the 'feeble-minded' expanded rapidly throughout the United States. At the turn of the century, intelligence testing, eugenics, and the 'menace' argument combined to effect the creation and expansion of special classes and schools for 'deficient' and deviant individuals, who were perceived for more than two decades to be identical. Elements of amelioration and social control were present in the intentions and the outcomes of special education arrangements. The special student population expanded both in numbers and in proportion relative to the general school population from the early 1930s and well into the 1980s.

Institutional and Residential Arrangements

Expansion of Institutions

The late nineteenth and early twentieth centuries were a period of expansion of institutions for individuals with special needs. By 1914 the distribution of residential institutions and schools for these individuals was as follows: forty-seven private and fifty-eight public institutions for the deaf; fifty-three private and eighty-one public establishments for juvenile delinquents; thirteen private and forty-eight state institutions for the blind; sixty-six private and twenty state schools for dependent and neglected children; thirty-nine private and thirty-nine state institutions for

'feeble-minded' and epileptic individuals; and thirty private and six public establishments for 'cripples' (McDonald, 1915, p. 108).

In the category of 'feeble-mindedness', medical professionals were the primary influence in the establishment of new institutions which had the title of 'school', 'training school', 'asylum', 'home', 'institute', or 'institution'. Establishments were opened in Iowa in 1877, Indiana and Minnesota in 1879, Kansas in 1881, California in 1885, Nebraska in 1887, New Jersey and Maryland in 1888, Michigan in 1895, and Montana in 1896 (Kanner, 1964, pp. 62, 66). While by 1876 there were eight state institutions for the 'feeble-minded' and an approximately equal number of private ones (Milligan, 1961), by 1898 there were twenty-four public institutions in nineteen states and one run by the city of New York. By 1917 only four states did not have any state supported institutions (Kanner, 1964, p. 66). The number of institutions continued to increase in the following decades; by 1925 there were sixty-four, by 1950 eighty-four, and by 1960 one-hundred and ten public establishments (Milligan, 1961). In 1955 only Arkansas and Nevada did not have state supported institutions expressly for people with mental disabilities. Apart from the public facilities there were at least one-hundred and sixty-nine private institutions in 1953. In terms of population approximately 160,000 individuals were accommodated in residential institutions in 1955, approximately 10% of the estimated population with mental disabilities in the United States at the time (Wallin, 1955, pp. 11-12, 16-17).

American Association on Mental Retardation

The creation of the *Association of Medical Officers of American Institutions for Idiots and Feeble-Minded Persons* in 1876 was a primary influence in institutional expansion. As stated in Article II of its Constitution:

The object of the Association shall be the discussion of all questions relating to the causes, conditions, and statistics of idiocy, and to the management, training, and education of idiots and feeble-minded persons; it will also lend its influence to the establishment and fostering of institutions for this purpose (Cited in Milligan, 1961, p. 368).

In 1906 the name of the Association was changed to the *American Association for the Study of the Feeble-Minded*, in 1935 to *American Association on Mental Deficiency* (AAMD) (Milligan, 1961), and in 1987 to the current *American Association on Mental Retardation* (Schulz, Carpenter, & Turnbull, 1991, p. 102). Its journal that had been renamed *Journal of Psycho-Asthenics* in 1896 changed its title to the standing *American Journal of Mental Deficiency* in 1940. According to Milligan (1961) the AAMD did not start to make any significant efforts toward the direction of community facilities until the 1940s.

An early precursor of community facilities was the colony, a geographically separate but functionally integral part of residential institutions. This practice was initiated in the state of New York during the late nineteenth and early twentieth centuries. The objective was to make a gradual social and economic adjustment to society, albeit in segregated-from-community farm and industrial settings (Bernstein, 1920; Wallin, 1955, p. 13).

Apart from the colony program, residential institutions for people with mental disabilities offered a variety of training. Wallin described in 1955 the various functions and curricula:

All the institutions (or at least the central plants) for the mentally deficient and epileptic maintain school departments which offer sensorimotor training and literary, craft, social, health, occupational, and sometimes certain types of vocational instruction. They also maintain occupational divisions which provide a great variety of employment outlets in cottage, shop, garden, and farm activities; recreational and social programs; religious exercises, often conducted by ministers from the community; hospital facilities; medical departments for diagnosis and treatment; and psychological departments for examination, diagnosis, and therapy. Some institutions have staffs of field workers, follow-up workers, or parole supervisors who serve as liaison officers between the institutions and the homes, gather genetic and social data, and assist released patients in obtaining jobs and becoming adjusted to the community (Wallin, 1955, pp. 14-15).

Many of these functions and parts of the curriculum remain basically similar in contemporary residential institutions.

The 'Menace' Scare

Around the turn of the century several leading specialists in the field of mental retardation sounded the alarm that the 'feebleminded' had become a social threat. There was a prevailing perception that if they were not stopped or contained their numbers would eventually overpower the rest of the population and destroy civilization. The movements of eugenics and intelligence testing were central to the menace argument (Davies, 1930, p. 48).

In the United States, in the late nineteenth and early twentieth centuries the eugenics movement was directed mainly by superintendents of asylums for the 'feebleminded' and the insane, by prison wardens and physicians, and by social scientists and social workers (Haller, 1963). Their main goal was the perpetuation of the best genetic endowment of the human species. The chief assumption was that intelligence and personality or behavior characteristics are a result of Mendelian laws and thus hereditary. Several studies and papers proclaimed an intimate link

between heredity, degeneracy, mental 'deficiency', immorality, pauperism, and crime (e.g. V. V. Anderson, 1919; Barr, 1913; Danielson & Davenport, 1912; Davenport, 1911; Dugdale, 1910; Estabrook, 1915; Estabrook & Davenport, 1912; Goddard, 1910, 1912, 1914, 1915).

Intelligence tests were found to be useful instruments in identifying the mentally 'deficient'. Lewis Terman lent his support and expertise to the eugenics movement:

'It is clear that society has few tasks more important than that of identifying the feeble-minded and providing for their institutional care. There is a growing conviction that society, in self-defense, will be driven to provide institutional care for every feeble-minded individual throughout the reproductive period (Terman & Cubberley, 1914, p. 2).

Philanthropic organizations joined in the panic rhetoric denouncing the evils brought upon civilized society by mental 'deficiency'. Anne Moore (1911), for example, stated in her study published by the *State Charities Aid Association* of New York:

...the feeble-minded are a menace to our present-day civilization and...the problem of caring for them can no longer with safety be ignored....[The] defect is often hereditary and incurable...[I]t leads to poverty, degeneracy, crime, and disease, and...the only way to deal with it effectively is to provide supervision and care that will last during the whole lifetime of the feeble-minded individual, certainly during the reproductive period (p. 11).

And she went on to insist that "the public is paying and will continue to pay until by proper segregation, crime, immorality and increase of their kind are effectively prevented among the feeble-minded" (p. 66).

In 1911 the *American Breeder's Association* reviewed ten possible solutions to the problem of 'feeble-mindedness' cited by Davies (1930): life segregation or segregation during reproductive period, sterilization, restrictive marriage laws and customs, eugenic education, systems of mating to remove defective traits, general environmental improvement, polygamy, euthanasia, Neo-Malthusianism (birth control), and laissez-faire. It was concluded that segregation

and sterilization would be the most effective solutions (pp. 96-99). Three years later E. R. Johnstone and Henry Goddard of the Vineland Institution inspired the launching of a nationwide campaign to promote the institutional segregation of the mentally 'deficient' (A. Johnson, 1923).

The calls of danger attracted the attention of politicians and the general public and the "hunt for the feeble-minded began. The more thoroughly the mental defective was searched for and found, the more completely was he apparently involved in all manner of offenses against the social order" (Davies, 1930, p. 76). By 1915 mental 'deficiency' was viewed as the most serious social problem and many states including New York, Pennsylvania, Kansas, Massachusetts, Minnesota, Ohio, Michigan, New Jersey, Indiana, and Virginia set up commissions to investigate the extent of the problem and suggest solutions (pp. 94-95). In New York, for example, the *State Commission to Investigate Provision for the Mentally Deficient* stated in its report:

...the mental defect is hereditary and is liable to be transmitted with almost unerring accuracy to succeeding generations. This danger is in turn aggravated by the well-known propagating tendency of the feeble-minded, and because, owing to their lack of mental balance, they are in most cases potential delinquents or criminals, peculiarly susceptible to the suggestions of evil-minded associates. There is, therefore, urgent need for a large extension of the present facilities of the State institutions for the care and custody of the dependent mentally defective (Report of the State Commission to Investigate Provision for the Mentally Deficient, 1915, pp. 253-254).

When Davies (1930) published his book *Social Control of the Mentally Deficient*, he reported that institutional arrangements for segregation remained quite inadequate in the United States. He cited the example of New York State, a leader in residential facilities at the time, where out of an estimated 40,000 'feeble-minded' population only 8,000 were institutionalized in 1928 (p. 126). Similarly out of an estimated 550,000 mentally 'deficient' population in the U.S. only 43,000 were segregated in institutions in 1923 (p. 130).

Sterilization began to gain vocal advocates and many supportive publications appeared in the 1920s (e.g. Laughlin, 1926a, 1926b; Gosney, 1929; Worthington, 1925). By 1926 thirty-three states had enacted sterilization laws for the mentally 'defective' (Davies, 1930, p. 99; Kanner, 1964, p. 136) but it seems that they were rarely enforced. In addition, they lost many of their basic civil rights including the right to vote (Bradley, 1978).

In the 1920s the perception of criminal and immoral deviancy of individuals with mental disabilities began to retreat. It was realized that only a small number had criminal tendencies and special institutions were created to house these mentally 'defective' delinquents (Davies, 1930, pp. 132-145). Studies surfaced showing that many people who had been classified as 'feebleminded' could become respected citizens with satisfactory social adjustment (e.g. V. V. Anderson & Fearing, 1922; Fernald, 1919a, 1919b; Massachusetts School for the Feeble-minded, 1918-1928; Matthews, 1922; Storrs, 1929; M. Taylor, 1925). Consequently, the notion arose that mental age as measured by intelligence tests was not an adequate criterion for assessing 'feeble-mindedness' (Goddard, 1928) and that criteria of social adaptability would also have to be included in the assessment process (Fernald, 1917). By 1930 the concept of individuals with mental 'deficiency' as perpetrators of most social evils had changed substantially:

...the large majority of special class graduates are able to take their places in community life as ordinary, decent, working citizens, who mind their own business and make their way in such a manner as to be in no sense social burdens or menaces (Davies, 1930, p. 323).

The Intelligence Testing Movement

Mental testing produced a change in the conceptual landscape: it transformed the idea of intelligence, itself a descendant of the idea of reason, from an amorphous, creative force to an 'objective' yet clearly value-laden dimension of individual differences consisting essentially, or 'operationally,' of getting the right answer on more or less clever little problems (Samelson, 1979, p. 155).

The Beginnings of Intelligence Scales

The creation of intelligence tests in the beginning of the twentieth century was a major factor in the popularization and acceptance of eugenics theories. Alfred Binet, the father of intelligence scales, was appointed in 1904 by the French Minister of Public Instruction to devise a way of identifying students in public schools who could not follow the general curriculum and were an impediment to teachers and other students in class. In 1905 with the cooperation of Theodore Simon he developed an intelligence scale which was revised in 1908 and 1911 (Kanner, 1964, pp. 119-122).

By the end of the first decade, the Binet-Simon intelligence scale had caught the attention of many American social scientists and educators. Early prominent figures in the intelligence testing such as Henry H. Goddard, Lewis M. Terman, Edward L. Thorndike, Robert M. Yerkes, James McKeen Cattell, F. Kuhlmann, Bridges, and Hardwick acted as advocates and refiners of intelligence tests (P. D. Chapman, 1988, p. 6; Davies, 1930, pp. 52-53). In 1911 the *American Association for the Study of the Feeble-Minded* decided to get involved in "standardizing the [intelligence] tests in such a way as to make them suitable for use in any part of the country....It was unanimously decided that the Association should take steps to start this movement and that research and record work should be taken up by each institution" (Milligan, 1961, p. 361).

Adoption of Intelligence Testing in Schools

Perhaps the first widespread use of intelligence testing was conducted by the U.S. army during World War I. To the astonishment of many, 47.3% of Caucasian-American draftees were classified as 'feeble-minded' (Davies, 1930, pp. 3-4). The classification of such a great number as mentally 'deficient' was obviously spurious and quite likely the used tests were invalid for many draftees because of literacy, cultural, and second language factors. Despite evident problems, intelligence testing continued to be endorsed with minor, if any, reservations. The potential for school efficiency was stressed. John L. Tilsdley (1921), district superintendent of New York city high schools, praised intelligence scales at the National Association of Secondary School Principals in 1921:

Now that we are able to discover in the early years of the elementary school, with a reasonable degree of accuracy, through the use of these tests, which is the pure silk and which the sow's ear, is it not reasonable to demand that we as educators shall so modify, adjust, and apply the educational process to the materials in our charge whose qualities we know that the silk shall be made into a silk purse and the sow's ear into a pigskin purse which in the view of many of us is of no less value to society than is the silken purse? (p. 54).

By 1925 intelligence tests had been accepted as invaluable instruments and according to P. D. Chapman (1988) there were seventy-five tests of general ability totalling sales of four million copies (p. 1). In a survey study conducted by the U.S. Bureau of Education (1926) it was found that 86% of the cities in the sample utilized intelligence tests in their public schools. By 1930 there were over 130 mental tests in the U.S. market (Hildreth, 1933) - an indication that intelligence testing and ability grouping had become two of the most prevalent characteristics of American education (P. D. Chapman, 1988, p. 6).

The adoption of intelligence tests in schools took no more than twenty years to accomplish, an impressive achievement indeed given the magnitude and scope of the reform. P. D. Chapman (1988) has suggested several reasons for this rapid adoption: a 'top-down' imposition by university professors of psychology and public school administrators assisted by philanthropic, educational, and governmental organizations; increasingly diverse school enrollments because of immigration, urbanization, and compulsory schooling laws; the progressive objectives of school efficiency and order; and the perceived inferiority of certain ethnic, minority, and immigrant groups (pp. 4-5).

The intelligence scale introduced the concept of gradation of intelligence, which was used for a variety of purposes: diagnosis and classification, school efficiency, ability grouping, tracking, exclusion, and special education training. Henry Goddard was among the first to offer a classification scheme of the 'feeble-minded' according to psychometrically defined mental age: 'idiots' were defined as having a mental age of one to two years; 'imbeciles' with a mental age of three to seven years; and 'morons' with a mental age of eight to normal (Davies, 1930, pp. 55-56). It was thought that a large number of persons were in the borderline area and that special arrangements were needed for 'moronic' children in schools. Goddard expressed this view clearly in 1910:

Our public school systems are full of them, and yet superintendents and boards of education are struggling to make normal people out of them. One of the most helpful things that we can do would be to distinctly mark out the limits of this class and help the general public understand that they are a special group and require special treatment, in institutions when possible, in special classes in public schools, when institutions are out of reach (Cited in Kanner, 1964, p. 123).

Terman (1912, 1913, 1914), similarly to Goddard, espoused the use of intelligence tests for the identification of students with special needs and the establishment of special classes. Many

children identified as 'subnormal' attended these special classes but some were excluded altogether from public schools on the justification that they had an Intelligence Quotient lower than 50 (Wallin, 1955, p. 65).

In 1925 the U.S. Bureau of Education conducted a survey of 215 cities with population over 10,000 on the use of intelligence and achievement tests in their public elementary and secondary schools. All schools reported the use of group intelligence tests more often than individual testing. Classification of students into homogeneous groups, supplement of teachers' estimates of pupils' ability, diagnosis of failure, and establishment of classes for subnormal children were reported as the four highest ranking reasons for using intelligence and achievement tests (Deffenbaugh, 1925).

Vocational tracking has also been shown to have an intimate link with intelligence testing. Callahan (1962) has given an account of how pressures from the business community for more efficiency during the first three decades of the century led to efforts to develop standardized testing in schools. Standardized testing and vocational tracking evolved in a parallel fashion since the turn of the century, in a sense that they mutually reinforced their development (Tyack, 1974, p. 180).

Advocates and Critics

Individuals from certain immigrant, minority, and ethnic groups were more likely to be classified by intelligence tests in the subnormal categories and be assigned to special classes (P. D. Chapman, 1988, pp. 109-127). Racist overtones were consequently inescapable. Goddard (1911, 1914), for example, used Binet's scale to support his argument that African-Americans

and immigrants from Southeastern Europe were mentally inferior to immigrants from Northern Europe, and argued for the implementation of appropriate immigration quotas. According to Hofstadter (1955) and Higham (1970), intelligence testing played a major role in furthering the precedents of American fears about immigration, backing immigration restrictions, and explaining the poor performance of many immigrant groups as lack of ability.

Intelligence testing has had its more recent advocates in the figures of Jensen (1969), Herrnstein (1971), and Snyderman and S. Rothman (1988). Jensen provoked a renewed nature-nurture debate in 1969 regarding intelligence and its heredity. His argument about the inheritability of intelligence had considerable racial overtones and incited condemnations in many educational and political circles. Herrnstein followed a similar path placing more emphasis on the meritocratic benefits of intelligence testing. These benefits have been subsequently legitimated in a historical context:

In the 1950s, those liberal and informed Americans who most influenced public policy believed that intelligence and aptitude tests contributed to social progress. A society in which white Anglo-Protestant notions of character and the right connections had been of key importance in social and economic advancement was being transformed into one in which merit played a far more significant role (Snyderman & S. Rothman, 1988, p. 249).

Intelligence testing came under scrutiny from the very beginning. Cautionary notes were sounded on their imperfections, limitations, and aura of infallibility (e.g. Ayres, 1911; Wallin, 1912a, 1912b). There was even a short-lived controversy in the 1920s which did not have a significant effect because testing was unanimously accepted by most mainstream psychologists, educators, and administrators (Cronbach, 1975). The controversy continued throughout the years but it was not until the 1960s that criticisms became highly visible and gained a considerable degree of credibility (e.g. Gilbert, 1966; Goslin, 1967; Goslin & D. C. Glass, 1967; Gross, 1962;

Hoffmann, 1962; Loretan, 1965; Rosenthal & Jacobsen, 1968; Senna, 1969). The criticism intensified in the 1970s (e.g. Bowles, 1971; Bowles & Gintis, 1976; Carnoy, 1976; Gartner, Greer, & Riessman, 1974; Kamin, 1974; Karier, 1976; Marks, 1974; Spring, 1972) and 1980s (e.g. P. D. Chapman, 1988; Fass, 1980; Gould, 1981; Milofksy, 1989; Resnick, 1982).

The central point in the argument of intelligence-testing critics is that mental tests function as a means of justifying, legitimating, and perpetuating the existing social stratification. Leon Kamin (1974) has expressed this perspective quite strongly:

The I.Q. test in America, and the way in which we think about it, has been fostered by men committed to a particular social view. That view includes the belief that those on the bottom are genetically inferior victims of their own immutable defects. The consequence has been that the I.Q. test has served as an instrument of oppression against the poor - dressed in the trappings of science, rather than politics (pp. 1-2).

Scathing critiques have been directed against many leading exponents of intelligence tests. Marks (1972), for instance, has expressed the following opinion about Lewis Terman who was consulted throughout his career by California politicians on the efficiency of prisons, orphanages, reform schools for delinquents, and training schools for the 'feeble-minded':

In attempting to preserve the status-quo through scientific evidence derived from testing, Terman sacrificed objectivity for expediency, individuality for industrial efficiency, and freedom for social control....As a result Terman promoted social control and industrial efficiency at the expense of the freedom of the feeble-minded, the soldier, the parent, the child, the poor, the immigrant, the alien, the worker, and the Black (p. 46).

In a recent study, Milofsky (1989) examined the relationship between school psychology, special education, and intelligence testing. He conducted in-depth interviews and extensive observations with school psychologists, two-thirds of whom reported themselves to be diagnosticians - a clear indication of their role and of their overreliance on psychometric testing.

The observations revealed documentary evidence of differential treatment of minority groups and inappropriate test administration. In his comparison between political and historical justifications for special education and its pedagogical rationale, he concluded that organizational pressures alone in urban schools cannot justify the testing, classification, and placement of children in special education. Instead, he concluded, there is a strong ideological commitment by both the schools and school psychologists for such a practice and that "as a systematic intervention to help children, school psychology is basically bankrupt" (p. 175).

In summary, the peripheral elements related to the central criticism of intelligence tests have been identified as social sorting (Fass, 1980), discrimination, exclusion, cultural and linguistic biases, inappropriate administration and interpretation of results (Milofsky, 1989), racism, xenophobia (P. D. Chapman, 1988), reification (Gould, 1981), and industrial efficiency at the expense of humanistic education and individual freedom (Carnoy, 1976; Karier, 1976; Marks, 1974).

The controversy between advocates and critics of intelligence testing may be seen in its wider social context. On the one hand, there is the American progressive disposition which blends racial attitudes, a conviction in progress, and a trust in the scientific expert for efficient and objective assessment. On the other, there is the belief in human equipotentiality. Advocates of intelligence testing tend to stress the former while critics the latter. The political nature of the implications of intelligence testing, therefore, can hardly go unnoticed:

The controversy over testing is fundamentally a dispute about politics, about what means and measures will be utilized to determine who gets what, when and how! (Gifford, 1986, p. 431).

Whether an advocate or critic, the fact remains that intelligence tests had a substantial impact in accelerating tracking in American education (P. D. Chapman, 1988, p. 176). With regard to special education, they provided 'scientific evidence', unavailable in the nineteenth century, for the identification and classification of students with mental disabilities. Consequently they contributed more 'credible' justification for the expansion of differential arrangements for students with special needs.

Surveys of school systems throughout the U.S. in the late 1970s and early 1980s have indicated that intelligence testing, especially group testing, has diminished considerably (B. Anderson, 1982; Dimengo, 1978; Hall, 1981). Individual intelligence tests, nevertheless, continue to be used in special education diagnosis and planning (Snyderman & S. Rothman, 1988, p. 141).

Establishment and Expansion of Special Classes

The first special classes in public schools for students with disabilities were created at the very end of the nineteenth century. Initially, special classes were founded for students with behavior problems in New York city in 1874 and in Cleveland between 1875 and 1879 (Wallin, 1955, pp. 17-18). Special classes for similar students were established in Providence, Rhode Island in 1894 according to Wallin (1955, p. 18), or in 1896 according to Kanner (1964, p. 115). Other cities followed suit: Springfield, Massachusetts in 1897; Chicago in 1898; Boston in 1899; New York in 1900; Philadelphia in 1901; Los Angeles in 1902; Detroit and Elgin, Illinois in 1903; Trenton, New Jersey in 1905; Bridgeport Connecticut, Newton Massachusetts, Rochester New York, and Washington DC in 1906 (Kanner, 1964, p. 115; Wallin, 1955, p. 18).

According to Wallin (1955) the target population(s) for the initial establishment of special classes at different places are not well-known. Quite likely there was some variability in the target population(s) from city to city or from state to state depending on local circumstances such as group interests and lobbying.

Every student is familiar with the influence exerted by pressure groups in America in obtaining legislation favorable to their special interest and in defeating unwanted legislationincluding the education of handicapped children.....Some of these groups have actively campaigned not only to obtain legislative grants for the type they are interested in...but also to defeat legislation designed to aid other groups (Wallin, 1955, pp. 32-33).

He recalled two incidents in the 1920s in the states of Ohio and Missouri where professional groups with vested interests lobbied behind the scenes and succeeded in defeating legislation regarding people with mental disabilities (pp. 33-34).

In any case, special classes were created for a variety of social groups with disabilities: 'deaf', 'unruly or truant boys', 'mentally handicapped', 'blind', 'orthopedics' (physically disabled), 'speech defectives', 'pretuberculous or malnourished', 'epileptics', 'partially sighted', and the 'hard of hearing' (Wallin, 1955, pp. 18-19). In a survey study of city school systems conducted for the U.S. Bureau of Education in 1911, it was found that there was considerable variability in the availability of special classes for different target populations with disabilities: 10% of public schools had special classes for the 'physically exceptional'; 17% for the 'morally exceptional'; 39% for the 'environmentally exceptional' (non-English speaking and late-entering students); and 42% for the 'mentally exceptional' ('feeble-minded' and gifted) (Van Sickle, Witmer, & Ayres, 1911).

The high percentage of city public schools reporting special classes for students with mental disabilities as early as 1911 is not surprising. The alarmist calls, in combination with

compulsory schooling laws and the results of several school studies, had brought the issue of 'feeble-mindedness' to public attention. An early educational historian, Ellwood P. Cubberley (1919), commented on the nationwide enactment of child labor and compulsory schooling legislation:

One of the results of all this legislation has been to throw, during the past quarter of a century, an entirely new burden on the schools. These laws have brought into the schools not only the truant and the incorrigible, who under former conditions either left early or were expelled, but also many children of the foreign-born who have no aptitude for book learning, and many children of inferior mental qualities who do not profit by ordinary classroom procedure....Consequently, within the past twenty-five years the whole attitude toward such children has undergone a change, and an attempt has been made to salvage them and turn back to society as many of them as possible, trained for some form of social and personal usefulness (p. 381).

Leonard P. Ayres (1909), former superintendent of Puerto Rico schools, conducted a study which attracted national attention at the time of its publication. He searched through the files of 20,000 children in Manhattan schools and the school reports of cities across the United States and concluded that one third of the school population was 'retarded'. Subsequently, he advocated school reform providing more special classes, - especially for immigrants - flexible grading, and a more diverse curriculum. Other studies came to similar conclusions and made parallel recommendations (Van Denburg, 1911; Volkmar & Noble, 1914). The result was a sustained effort to expand special education arrangements:

Once the public schools became aware that the mentally deficient were present in large numbers in their own enrollment and that the relegation of all such cases to institutions was from many points of view out of the question, educators turned their attention to the organization of special classes or special schools for these handicapped pupils as a means of promoting the efficiency of the entire school system (Davies, 1930, pp. 293-294).

States began to enact legislation making special classes and special schools "mandatory or permissive" (Davies, 1930, p. 297) during the second decade of the twentieth century, and by 1927 there were fifteen such states: New Jersey in 1911; Minnesota in 1915; Illinois, Wisconsin, and New York in 1917; Massachusetts, Pennsylvania, Wyoming, and Missouri in 1919; California, Utah, and Connecticut in 1921; Louisiana in 1922; Oregon in 1923; and Alabama in 1927. Michigan, Rhode Island, and Ohio had an organization and operation of special classes without any legislation by 1927 (Davies, 1930, pp. 297-299). By 1952 all states, with the exception of Montana, Nevada, and the then territory of Hawaii, had passed school laws regarding students with disabilities (Wallin, 1955, p. 21).

In a survey of cities throughout the U.S. conducted by Wallin (1955) in 1948, it was found that the period between 1908 and 1937 witnessed the initiation of special classes in public schools in approximately 75% of the surveyed cities. More specifically, the percentages of cities reporting the year during which they started special classes were 5% between 1898 and 1907, 23% between 1908 and 1917, 33% between 1918 and 1927, 19% between 1928 and 1937, and 20% between 1938 and 1947 (pp. 19-20). The decade between 1918 and 1927 was the most active interval for the commencement of special classes, an observation that gains significance in light of the infiltration of American public schools by intelligence testing during the very same period.

Other survey data show the rapid expansion of special classes. Whereas there were 133 cities in twenty-three states with special classes in 1922, this number had increased more than five-fold to 730 cities in 47 states by 1948 (Office of Education, 1950, p. 10).

Federal Legislation

With the increasing role of the federal government in educational matters after World War II, federal legislation became highly visible and had the intention of setting national standards and trends. Laws having wide-ranging impact were enacted, including the education of social groups and individuals with disabilities. It goes without question that the federal government will continue to play a vital role in the field of American education.

During the late 1950s two influential laws were enacted. In 1958 the *Education of Mentally Retarded Children Act* (PL 85-926) authorized federal funding for training special education teachers and the *Captioned Films for the Deaf Act* (PL 85-905) authorized a loan service of captioned films for the deaf (U.S. Department of Education, National Center for Education Statistics, 1990, p. 326).

During the 1960s six significant laws were enacted. In 1965 the *Elementary and Secondary Education Act* (PL 89-10) authorized funding for elementary and secondary programs for students coming from poor families and the *National Technical Institute for the Deaf Act* (PL 89-36) established and funded a postsecondary school for the deaf. In 1966 the *Model Secondary School for the Deaf Act* (PL 89-694) authorized the creation of a secondary school for the deaf at Gallaudet College and the *Elementary and Secondary Education Amendments of 1966* (PL 89-750) made changes and provided funds to States for expanding programs for the disabled. In 1968 the *Elementary and Secondary Education Amendments of 1967* (PL 90-247) authorized funding to obtain qualified personnel, disseminate information on education of the disabled, aid regional centers for disabled children, and to assist model centers for deaf-blind children. In the same year the *Handicapped Children's Early Education Assistance Act* (PL 90-538) authorized

early education and preschool programs for disabled children (U.S. Department of Education, National Center for Education Statistics, 1990, pp. 327, 328).

The 1970s were a decade when the concepts of 'mainstreaming' and 'normalization' gained official recognition amid controversial and conflicting developments. In 1974 the *Education of the Handicapped Amendment to the Elementary and Secondary Education Act* (PL 93-380) laid the ground for PL 94-142 (Gearheart, Weishahn, & Gearheart, 1992, p. 25). The *Education of the Handicapped Act* (PL 94-142), in 1975, mandated the education of all disabled children in the most appropriate environment. In 1970 the *Elementary and Secondary Education Assistance Programs, Extension* (PL 91-230) authorized funds to State and local education organizations for thorough planning and evaluation (U.S. Department of Education, National Center for Education Statistics, 1990, pp. 328, 329). In 1973 the *Vocational Rehabilitation Act Amendments* (PL 93-112) included section 504 on the rights of the disabled (Gearheart, Weishahn, & Gearheart, 1992, p. 25).

During the 1980s there were several pieces of legislation with respect to the disabled. In 1983 the *Education of Handicapped Act Amendments* (PL 98-199) dealt with architectural barriers and the partaking of disabled children in private schools, and the *Education Consolidation and Improvement Act of 1981, Amendments* (PL 98-211) appended technical amendments in Chapter 1 arrangements. In 1984 the *Rehabilitation Amendments of 1984* (PL 98-221) made modifications and additions to the Rehabilitation Act of 1973, and contributed support to the Helen Keller National Center for Deaf-Blind. In the same year the *Carl D. Perkins Vocational Education Act* (PL 98-524) granted funds to the States to furnish accessible vocational education programs to

the disabled and the disadvantaged (U.S. Department of Education, National Center for Education Statistics, 1990, p. 330).

In 1986 there were four new laws. First, the *Education of the Deaf Act* (PL 99-371) placed a school and an institute for the deaf on five-year reauthorization cycles and organized a commission to study education for the deaf. Second, the *Handicapped Children's Protection Act* (PL 99-372) gave parents of disabled children the ability to claim legal fees for cases under the Education of the Handicapped Act, and specified that the Education of the Handicapped Act cannot preempt other laws (as for example Section 504 of the Rehabilitation Act). Third, the *Reauthorization of the Education of the Handicapped Act, Amendments* (PL 99-457) extended for three years several programs under the Education of the Handicapped Act and provided states with grants for children with disabilities between the ages of three and five and incentives for early childhood intervention for disabled children from birth to two years of age. Fourth, the *Reauthorization of the Rehabilitation Act* (PL 99-506) extending vocational rehabilitation programs for disabled persons for five years and instituting funding to the States for programs of supported employment (U.S. Department of Education, National Center for Education Statistics, 1990, p. 331).

In 1988 three laws were passed. The *Augustus F. Hawkins-Robert T. Stafford Elementary and Secondary School Improvement Amendments of 1988* (PL 100-297) extended through 1993 Chapter 1 programs. The *Handicapped Programs Technical Amendments Act of 1988* (PL 100-360) made some technical amendments to the Rehabilitation Act of 1973 and the Education of the Handicapped Act. The *Technology-Related Assistance for Individuals with Disabilities Act of 1988* (PL 100-407) gave funding aid to the States to generate and realize technological service

programs for individuals of all ages with disabilities. Finally, in 1989 the *Children with Disabilities Temporary Care Reauthorization Act of 1989* (PL 101-127) modified and expanded various programs initiated by the Temporary Child Care for Handicapped Children and Crises Nurseries Act of 1986 (U.S. Department of Education, National Center for Education Statistics, 1990, pp. 331, 332).

In 1990 the *Individuals with Disabilities Education Act of 1990* (PL 101-476) made changes in the definitions of disabilities by substituting the term 'handicapped' with 'disabled' but the basics of PL 94-142 remained the same (Gearheart, Weishahn, & Gearheart, 1992, p. 25). The *Carl D. Perkins Vocational and Applied Technology Education Act Amendments of 1990* (PL 101-392) amended and extended the Act through 1995. Finally, the *National Assessment of Chapter 1 Act* (PL 101-305) required the Secretary of Education to make a complete assessment of Chapter 1 programs (U.S. Department of Education, National Center for Education Statistics, 1991, p. 346).

So far, federal legislation has had both positive and negative effects. On the positive side, it has introduced more beneficial practices through the concepts of Least Restrictive Environment and due process. Students with disabilities now have more options with regard to educational alternatives. The old assumption that identification with and classification in certain categories leads to automatic segregation is no longer valid or acceptable. Students with disabilities and their parents have the right to contest classification and placement decisions through procedures established by law (Lipsky & Gartner, 1989bc; H. Turnbull, 1986).

On the negative side, legislation has encouraged the active search for students with disabilities, established an expensive bureaucratic apparatus, and furthered professional authority

through legalistic jargon and complicated assessment, planning, and evaluation procedures (Biklen, 1992, pp. 87-88; Lipsky & Gartner, 1989bc; Villa & Thousand, 1990; L. J. Walker, 1987). Since the middle of the 1960s, incentives and funding for special education purposes have contributed to the enlargement of the exceptional student population.

...[T]here is a tendency to substitute special education programs for other programs to assist students who have special needs but are obviously not mentally retarded, learning disabled, or emotionally disturbed. This tendency is encouraged by the fact that programs for students with disabilities receive substantial state funding, whereas many other programs do not (Gearheart, Weishahn, & Gearheart, 1992, p. 51).

Despite due process, accentuated bureaucracy has made it difficult for parents to ensure their children's rights.

The Expansion of the Exceptional Student Population

The Period Between Early 1930s and 1970

According to Wallin (1955), enrollment in special education classes in different states during the first half of the twentieth century fluctuated erratically. He attributed these fluctuations to changes in administrative leadership, the exerting influence of various lobby groups, the specific nature of local state laws, and the availability of funds (pp. 28-35).

By the early 1930s special education in the U.S. was still considered as severely lacking. The White House Conference on Child Health and Protection (1931) reported that only a small percentage, less than 10%, of disabled children in public schools was enrolled in special classes (pp. 5ff, 554). Davies (1930) made similar estimates with regard to children with mental

disabilities (pp. 299-301) and he stated that "by far the largest and most important part of the whole mental deficiency program has fallen squarely upon the public schools" (p. 294).

The situation had changed minimally in the 1940s and early 1950s. The U.S. Office of Education (1950) reported that in 1948 only 11% of the estimated children with disabilities were receiving instruction in special classes or schools (pp. 1, 3, 9). In the mid-1950s Wallin (1955), who supported the expansion of special education programs, perceived them to be quite inadequate in terms of serving most children with special needs:

For the nation at large, all the instruction that 85 percent of our handicapped children receive in the public schools is given by the regular classroom teachers (p. 382).

Every teacher in the regular grades has thrust upon her the problem of teaching handicapped children at some time or other (p. 381).

He had the same perception about special programs for children with mental disabilities:

...the great majority of mentally deficient children are at large in society and attend the regular grades rather than special classes (p. 35).

Statistics released by various U.S. government agencies, discussed below, indicate that the expansion of the exceptional student population began in the late 1940s and early 1950s. The statistical models as to the occurrence of various disabilities in the general population existed before the actual expansion. In fact, it appears that there was an ideological commitment by most American educators, in the line argued by Milofsky (1989), to translate statistical estimates of disabling conditions into observed occurrence by augmenting identification, classification, and special education services.

There is a widely held perception that "the whole history of education for...[special] students can be told in terms of one steady trend that can be described as progressive inclusion"

(Reynolds & Birch, 1982, p. 27). The relatively recent and swift increases in special program enrollments, however, contradict this simplistic view of American public education as a model of linear progressive inclusion of exceptional students.

In **Table 1** there is a display of the general U.S. population figures from 1932 to 1970. The total increase of the U.S. resident population from 1932 to 1970 amounted to 63 percent. During the same period, elementary and secondary public school enrollment, presented in **Table 2**, increased by 75% reaching almost 46 million students in 1970.

The percentage increase of the total enrollment of exceptional children in special programs (see **Table 3**) by far surpassed the increases of the general U.S. population and enrollment in public schools. In 1932 there were 162 thousand students enrolled in special education programs while in 1970 there were more than 2.6 million such students, an immense increase of 1,552 percent.

A breakdown of statistics shows that the incremental pattern was consistent across all classification categories. More specifically, the following percentage increases in special education enrollments were calculated for the period between 1932 and 1970: mentally retarded 1,007%, emotionally and socially maladjusted 707%, crippled and special health problems 573%, speech impaired 5,278%, aurally handicapped 1,850%, and visually handicapped 380 percent. Thus, the largest percentage increases were found, in ranking order, in the speech impaired, the aurally handicapped, and the mentally retarded categories.

The speech impaired, mentally retarded, and crippled and special health problems categories represented 85% in 1932 and 87% in 1970 of the total special education enrollments.

TABLE 1
U.S. Population Increase from 1932 to 1970

Year	Total Resident Population	Percent ¹ Increase from Previously Indicated Year	Percent ¹ Increase from 1932
1932	124,840,000	--	--
1940	131,954,000	6%	6%
1950	151,235,000	15%	21%
1960	179,979,000	19%	44%
1963	188,483,000	5%	51%
1966	195,576,000	4%	57%
1970	203,810,000	4%	63%

¹ Percentages have been rounded

SOURCE: U.S. Bureau of the Census. (1975). *Historical statistics of the United States, colonial times to 1970* (Vol. 1, 138). Washington, DC: Government Printing Office, p. 8.

TABLE 2

U.S. Public School Enrollment from 1932 to 1970

Year	Total Enrollment in Public Elementary & Secondary Schools (Kindergarten level included)	Percent ¹ Increase from Previously Indicated Year	Percent ¹ Increase from 1932
1932	26,275,000	--	--
1940	25,434,000	-3%	-3%
1950	25,111,000	-1%	-4%
1960	36,087,000	44%	37%
1964	41,416,000	15%	58%
1966	43,039,000	4%	64%
1970	45,909,000	7%	75%

¹ Percentages have been rounded

SOURCES:

U.S. Bureau of the Census. (1975). *Historical statistics of the United States, colonial times to 1970* (Vol. 1, 138). Washington, DC: Government Printing Office, p. 368.

U.S. Department of Education, National Center for Education Statistics. (1990). *Digest of Education Statistics, 1990*. Washington, DC: Government Printing Office, p. 12.

TABLE 3

Enrollment of Exceptional Children in Special Programs from 1932 to 1970¹

Year	Total ² Enroll- ment	Mentally Retarded	Emotion. & Socially Maladjust- ed	Crippled & Special Health Problems	Speech Impaired	Aurally Handicap.	Visually Handicap.	Other Handic. Condit.
1932	162,000	75,000	14,000	40,000	23,000	4,000	5,000	--
1940	311,000 (92%) ³	98,000 (31%) ³	10,000 (-29%) ³	53,000 (33%) ³	126,000 (448%) ³	13,000 (225%) ³	9,000 (80%) ³	--
1948	357,000 (15%) ³	87,000 (-11%) ³	15,000 (50%) ³	50,000 (-6%) ³	182,000 (44%) ³	14,000 (8%) ³	8,000 (-11%) ³	--
1958	838,000 (135%) ³	223,000 (156%) ³	29,000 (93%) ³	52,000 (4%) ³	490,000 (169%) ³	20,000 (43%) ³	12,000 (50%) ³	12,000
1963 ⁴	1,467,000 (75%) ³	432,000 (94%) ³	80,000 (176%) ³	65,000 (25%) ³	902,000 (64%) ³	46,000 (130%) ³	22,000 (83%) ³	22,000 (83%) ³
1966	1,794,000 (23%) ³	540,000 (25%) ³	88,000 (10%) ³	69,000 (6%) ³	990,000 (23%) ³	51,000 (11%) ³	23,000 (5%) ³	33,000 (50%) ³
1970	2,677,000 (49%) ³	830,000 (54%) ³	113,000 (28%) ³	269,000 (290%) ³	1,237,000 (25%) ³	78,000 (53%) ³	24,000 (4%) ³	126,000 (282%) ³
Percent Increase 1932-70	1,552%	1,007%	707%	573%	5,278%	1,850%	380%	--

¹ All percentages have been rounded

² The Total Enrollment numbers do not include students in the Gifted category (Gifted category included in the SOURCE table)

³ Percentages in brackets are increases from previously indicated year

⁴ Beginning 1963, includes residential schools

SOURCE: U.S. Bureau of the Census. (1975). *Historical statistics of the United States, colonial times to 1970* (Vol. 1, 138). Washington, DC: Government Printing Office, p. 372.

In 1970 the numbers for these three categories were: over 1.23 million speech impaired, 830 thousand mentally retarded, and 269 thousand crippled and special health problems.

The growth of the exceptional population being served in special programs is a relatively recent phenomenon. The total enrollment jumped from 838 thousand in 1958 to well over 2.6 million in 1970, an increase of 219 percent. During the same period enrollments in the speech impaired category increased by 244%, in the mentally retarded category by 272%, and in the crippled and special health category by 417 percent. For all the categories in **Table 3** there were large increases throughout the 1960s.

Since 1963 exceptional students in residential schools have been included in the enrollment figures. This, nevertheless, did not alter the statistics in any significant manner. As presented in **Table 4**, in 1963, 92% of exceptional children were enrolled in special education programs in local public schools while only 8% were in public and private residential schools. In the academic year 1970-71 these percentages were 95% and 5% respectively.

The increases of the general American population and enrollments in public schools alone cannot account for this increase in the number of students enrolled in special education programs from the early 1930s to 1970. Instead, there had to be a widespread consensus and political will among politicians, administrators, educators, teachers, and psychologists to effect such massive change.

The Period Between 1970 and 1990

The commitment to the expansion of the exceptional population becomes even more evident by examining government statistics with regard to school enrollments and exceptional

TABLE 4

**Enrollment of Exceptional Children in Special
Education Programs from 1963 to 1970-71**

Year	Total Enrollment¹	Local Public Schools¹	Public & Private Residential Schools
1963	1,467,680 (100%)	1,355,699 (92%)	111,981 (8%)
1970-71	2,677,000 (100%)	2,544,000 (95%)	133,000 (5%)

¹ The Total Enrollment and Local Public School figures do not include students in the Gifted category (Gifted category included in the SOURCE table)

SOURCE: U.S. Department of Education, National Center for Education Statistics. (1980). *Digest of education statistics, 1980*. Washington, DC: Government Printing Office, p. 43.

programs after 1970. In **Table 5** the enrollments in American public elementary and secondary schools from 1970 to 1989 are listed. After 1971 there was a steady decline in public school enrollments until 1985. Overall, there was a decrease in student enrollments from almost 46 million in 1970 to approximately 40.5 million in 1989, a total decrease of twelve percentage points.

During the same period, there was a decrease in the numbers of exceptional students in most disabling conditions but there was an overall increase of the total special student population. In **Table 6** the numbers of exceptional children in the various classification categories enrolled in federally supported special education programs from 1976-77 to 1988-89 are presented. In most categories there were decreases in enrollment since 1970: mentally retarded -32%, orthopedically handicapped and other health impaired (see footnote 6 in **Table 6**) -67%, speech impaired -22%, hard of hearing and deaf -28%, and visually handicapped -4 percent. The seriously emotionally disturbed category, on the other hand, grew by 233 percent. The learning disabled category, officially included in school statistics around 1970, increased enormously. In 1976-77 it already made up 21.6% of the total exceptional population while in 1988-89 it had expanded to 43.6% of this population.

The expansion of the learning disabled category is largely responsible for the overall growth in the numbers of the exceptional student population from approximately 2.6 million in 1970 to more than 4.5 million in 1988-89, an increase of 70 percent (see **Table 6**). In 1932 the total exceptional student population accounted for 0.62% of the public school population (calculated from statistical data in **Tables 2** and **3**), in 1976-77 it was 8.33%, and in 1988-89 it had increased even more to 11.30 percent. During the same period, the learning disabled

TABLE 5
U.S. Public School Enrollment from
1970 to 1989

Year	Total Enrollment in Public Elementary & Secondary Schools (Kindergarten included)	Percent ¹ Increase from Previously Indicated Year	Percent ¹ Increase from 1970
1970	45,909,000	--	--
1974	45,053,000	-2%	-2%
1975	44,791,000	-1%	-2%
1976	44,317,000	-1%	-3%
1977	43,577,000	-2%	-5%
1978	42,550,000	-2%	-7%
1979	41,645,000	-2%	-9%
1980	40,918,000	-2%	-11%
1981	40,022,000	-2%	-13%
1982	39,566,000	-1%	-14%
1983	39,252,000	-1%	-15%
1984	39,208,000	(²)	-15%
1985	39,422,000	1%	-14%
1986	39,753,000	1%	-13%
1987	40,008,000	1%	-13%
1988	40,189,000	(²)	-12%
1989	40,526,000	1%	-12%

¹ Percentages have been rounded

² Change of less than 0.5%

SOURCES:

U.S. Department of Education, National Center for Education Statistics. (1990). *Digest of education statistics, 1990*. Washington, DC: Government Printing Office, p. 12.

U.S. Department of Education, National Center for Education Statistics. (1991). *Digest of education statistics, 1991*. Washington, DC: Government Printing Office, p. 49.

TABLE 6

Exceptional Children¹ Served in Public School Federally-Supported Special Education Programs from 1976-77 to 1988-89

	1976-77	1978-79	1980-81	1982-83	1984-85	1986-87	1988-89	Percent ² Increase 1970 ³ to 1988-89
Mentally Retarded	959,000 (26.0%) ⁴	901,000 (23.2%)	829,000 (20.8%) ⁴	757,000 (17.9%) ⁴	694,000 (16.1%) ⁴	643,000 (14.7%) ⁴	564,000 (12.7%) ⁴	-32%
Serious, Emotion, Disturbed	293,000 (7.7%) ⁴	300,000 (7.7%) ⁴	346,000 (8.4%) ⁴	352,000 (8.3%) ⁴	372,000 (8.6%) ⁴	383,000 (8.8%) ⁴	376,000 (8.3%) ⁴	233%
Orthopedical, Handicapped ⁴	87,000 (2.4%) ⁴	70,000 (1.8%) ⁴	58,000 (1.4%) ⁴	57,000 (1.3%) ⁴	56,000 (1.3%) ⁴	57,000 (1.3%) ⁴	47,000 (1.0%) ⁴	-57%
Other Health Impaired ⁴	141,000 (3.8%) ⁴	105,000 (2.7%) ⁴	98,000 (2.4%) ⁴	50,000 (1.2%) ⁴	58,000 (1.5%) ⁴	52,000 (1.2%) ⁴	43,000 (0.9%) ⁴	
Speech Impaired	1,302,000 (35.3%) ⁴	1,214,000 (31.2%) ⁴	1,168,000 (28.2%) ⁴	1,131,000 (26.6%) ⁴	1,126,000 (26.1%) ⁴	1,136,000 (26.3%) ⁴	967,000 (21.1%) ⁴	-22%
Hard of Hearing & Deaf	87,000 (2.4%) ⁴	85,000 (2.2%) ⁴	79,000 (1.9%) ⁴	73,000 (1.7%) ⁴	69,000 (1.6%) ⁴	65,000 (1.5%) ⁴	56,000 (1.2%) ⁴	-28%
Visually Handicapped	38,000 (1.0%) ⁴	32,000 (0.8%) ⁴	31,000 (0.8%) ⁴	28,000 (0.7%) ⁴	28,000 (0.7%) ⁴	26,000 (0.6%) ⁴	23,000 (0.5%) ⁴	-4%
Learning Disabled	796,000 (21.6%) ⁴	1,130,000 (29.1%) ⁴	1,462,000 (35.3%) ⁴	1,741,000 (40.9%) ⁴	1,832,000 (42.4%) ⁴	1,914,000 (43.8%) ⁴	1,987,000 (43.6%) ⁴	--
Multi-handicapped	--	50,000 (1.3%) ⁴	68,000 (1.6%) ⁴	63,000 (1.5%) ⁴	69,000 (1.6%) ⁴	97,000 (2.2%) ⁴	85,000 (1.9%) ⁴	--
Deaf-blind	--	2,000 (⁵)	3,000 (⁵)	2,000 (⁵)	2,000 (⁵)	2,000 (⁵)	2,000 (⁵)	--
Pre-school Handicapped ⁴	--	--	--	--	--	--	394,000 (8.7%) ⁴	--
Total Served	3,692,000	3,889,000	4,142,000	4,255,000	4,315,000	4,374,000	4,544,000	70%

¹ Between the ages of 3 and 21 years

² Increase percentages have been rounded

³ See Table 3

⁴ Prior to 1987-88, these students were included in the counts by handicapping condition. Beginning in 1987-88, States are no longer required to report preschool handicapped students (0-5 years) by handicapping condition

⁵ Percentage out of total number of children served in special education programs. Percentages have been rounded

⁶ These two categories were under the Crippled and Special Health Problems label in 1970

⁷ Less than 0.1 percent

SOURCE: U.S. Department of Education, National Center for Education Statistics. (1990). *Digest of education statistics*, 1990. Washington, DC: Government Printing Office, p. 63.

population had grown from 1.80% to 4.94% of the public school population (see **Table 7**). Thus, the increase of the exceptional student population continued throughout the 1970s and 1980s despite decreases in most disabling conditions and in the general public school enrollments.

In 1988-89, four categories represented 85.7% of the total special student population. In ranking order they were: learning disabled 43.6%, speech impaired 21.1%, mentally retarded 12.7%, and seriously emotionally disturbed 8.3 percent (see **Table 6**).

It has been suggested that the decrease in the number of students classified under the mentally retarded label is due to the creation of the learning disabled category. Parents find it more acceptable to have their children classified learning disabled rather than mildly mentally retarded because of the social stigma carried by the latter. Gartner and Lipsky (1987) have called it "classification plea bargaining" (p. 373), a response to charges against special education as discriminatory toward ethnic and racial minorities and other disadvantaged groups. The reported decreases in many exceptional student categories appear to be deceptive because most of these students have not been delabeled; many have been identified as learning disabled.

The 'Learning Disabled' label has functioned as a convenience category where students from a wide range of learning problems are grouped. Its definition has been controversial since its official establishment in 1969 (Bryan, Bay, & Donahue, 1988) and its diagnostic processes have been attacked as nebulous and inconsistent (Algozzine & Ysseldyke, 1983; G. S. Cole, 1978; Goldman & Gardner, 1989; Mann, Davis, Boyer, Metz, & Wolford, 1983). According to Ysseldyke (1987) more than 80% of the student population could be classified as learning disabled by one or more of the definitions currently in use. It has been pointed out that students labeled learning disabled cannot be differentiated from other low achievers in terms of a wide

TABLE 7

**Exceptional Children¹ Served in Federally
Supported Special Education Programs as a
Percentage of Total Elementary and
Secondary Public School Enrollment
(Kindergarten included) from 1976-77 to
1988-89**

	1976-77	1978-79	1980-81	1982-83	1984-85	1986-87	1988-89
Mentally Retarded	2.16%	2.12%	2.03%	1.91%	1.77%	1.62%	1.40%
Serious. Emotion. Disturbed	0.64%	0.71%	0.85%	0.89%	0.95%	0.96%	0.94%
Speech Impaired	2.94%	2.85%	2.85%	2.86%	2.87%	2.86%	2.41%
Learning Disabled	1.80%	2.66%	3.57%	4.40%	4.57%	4.81%	4.94%
Pre-school Handi-capped²	--	--	--	--	--	--	0.98%
All Condi-tions³	8.33%	9.14%	10.12%	10.75%	11.00%	11.00%	11.30%

¹ Between the ages of 3 and 21 years

² Prior to 1987-88, these students were included in the counts by handicapping condition. Beginning in 1987-88, States are no longer required to report preschool handicapped students (0-5 years) by handicapping condition

³ Apart from the ones listed, it includes hard of hearing and deaf, orthopedically handicapped, other health impaired, visually handicapped, multihandicapped, and deaf-blind

SOURCE: U.S. Department of Education, National Center for Education Statistics. (1990). *Digest of education statistics, 1990*. Washington, DC: Government Printing Office, p. 63.

variety of school-related characteristics (Bartoli & Botel, 1988; Ysseldyke, Thurlow, Christenson, & Weiss, 1987). In a study it was found that experienced specialists, presented with school records, failed to differentiate between students already certified as learning disabled and other nonlabeled students (W. A. Davis & Shepard, 1983). Carrier (1983, 1986), hence, has suggested that learning disability theory and practice are nothing more than another case of psychological analysis masking sociological forces in education.

Experts in the field of learning disability have acknowledged all these problems:

...this apparent ambiguity of the LD definition has been a convenient scapegoat for a variety of problems in both regular and special education. It has been blamed for a host of undesirable conditions, including inflated referral rates and inappropriate special placements. Many children with relatively minor learning problems, or whose academic deficiencies stem from motivational deficits, environmental problems, or cultural differences, or simply those whose teachers are less willing to accommodate a diversity of students needs within the classroom, may have been incorrectly labeled as learning disabled (Bryan, Bay, & Donahue, 1988, p. 24).

Nonetheless, they continue to insist that problems and inconsistencies are more a result of fallible measurement and they suggest that there is a need to improve the operational procedures of classification and identification rather than to abolish them (Keogh, 1988).

Theoretical Estimates and Observed Occurrence

The augmentation of the exceptional population has come to decrease the gap between theoretical estimates of disability and observed occurrence over the years. The result has been that in recent years theoretical estimates and observed occurrence coincide for three exceptional categories that represent the majority of the special student population. **Table 8** presents the theoretical estimates of various disabilities in the U.S. child population and the actual

TABLE 8

**Theoretical Estimate¹ of Exceptionality as a
Percentage of U.S. Child Population and
Actual Identification of Exceptional Children
Served in Special Education Programs as a
Percentage of Public School Enrollment in
1988-89**

	Theoretical Estimate	Actual Identification
Mentally Retarded	1.00% to 3.00%	1.40%
Emotionally Disturbed	1.00% to 3.00%	0.94%
Orthopedically and Other Health Impaired	0.40% to 0.60%	0.23%
Speech Impaired	2.00% to 4.00%	2.41%
Hard of Hearing & Deaf	0.50% to 0.70%	0.14%
Visually Handicapped	0.08% to 0.12%	0.06%
Learning Disabled	2.00% to 4.00%	4.94%
Multihandicapped	0.50% to 0.70%	0.21%

¹ As presented by U.S. government agencies and recognized authorities the last 30 to 40 years

SOURCES:

U.S. Department of Education, National Center for Education Statistics.(1990). *Digest of education statistics, 1990*. Washington, DC: Government Printing Office, p. 63.

Gearheart, B. R., Weishahn, M. W., & Gearheart, C. J. (1992). *The exceptional child in the regular classroom* (5th ed.). New York: Merrill-Macmillan, pp. 17-18.

identification of exceptional children served in special education programs in 1988-89. The mentally retarded, speech impaired, and learning disabled categories, which represented 77.4% of the exceptional student population in 1988-89 (**Table 6**), were all well within their respective theoretical estimate range (see **Table 8**). The mentally retarded and speech impaired categories have been decreasing in size since 1970 (see **Table 6**) and it appears unlikely that they will increase in the near future. The learning disabled category has already surpassed the estimate range of 2.0% to 4.0% to stand at an observed occurrence of 4.94% of the 1988-89 public school enrollment (see **Table 8**). The learning disabled category will probably stabilize at present levels over the next years.

The emotionally disturbed, orthopedically and other health impaired, hard of hearing and deaf, visually handicapped, and multihandicapped categories, which represented 13.8% of the special student population in 1988-89 (see **Table 6**), were approximating their respective theoretical estimate range (see **Table 8**). The orthopedically and other health impaired, hard of hearing and deaf, and visually handicapped categories have been decreasing in size since 1970 (see **Table 6**), an indication that it is unlikely that they will reach the theoretical estimate range in the near future. The emotionally disturbed category, on the other hand, has increased by 233% in the period between 1970 and 1988-89 (see **Table 6**) and it seems quite plausible that it will continue to grow into the theoretical estimate range.

With respect to the preschool handicapped category (students 0-5 years old) no definite trend can be discerned yet from available data since statistics have been published for the 1987-88 and 1988-89 academic years only (U.S. Department of Education, National Center for

Education Statistics, 1991, p. 61). Nevertheless, since recent legislation has made funding available for this category it would not be surprising if it grows over the coming years.

Philosophy and Practice

Beginning in the last quarter of the nineteenth century, a variety of plans were devised by teachers and school administrators as solutions to the problem of individual differences (P. D. Chapman, 1988, pp. 49-51). It was recognized that the primary institution for the education of learners with special needs would be the public school:

The position of the public school in the mental deficiency program is unique. No other agency can begin to make so effective a contribution to the social control of mental deficiency. No other agency, by its neglect of this problem, can leave so much damage to be repaired by other agencies (Davies, 1930, pp. 301-302).

The preferred method was separate special classes which, however, did not start to become available in many places in the U.S. until the 1930s. Out of necessity the vast majority of special learners had to be educated in the regular classroom and suggestions were given to regular teachers with regard to teaching strategies that could be employed in the absence of special classes (e.g. Gesell, 1925). Ironically, as special education philosophy began to adopt a relatively more inclusive stance - that is, more inclusive for that time period - as presented in succeeding textbooks (e.g. M. L. Anderson, 1917; W. B. Featherstone, 1941; Horn, 1924; Kirk & G. O. Johnson, 1951; *Special Class Teachers in Boston*, 1921; Wallin, 1924, 1955; Whipple, 1927), the number of exceptional children in special classes increased dramatically.

Despite scientific and social-historical developments, the major tenets of American special education have remained more or less constant. Wallin (1955) summarized these tenets as they

were widely accepted in 1955: variability of school population in abilities, deeply ingrained or constitutional limitations, education according to individual needs, standardized intelligence and ability testing, diagnosis and classification, special versus regular education instruction and skills, homogeneous grouping of students, and segregation (pp. 40-62). The first three tenets still stand largely unquestioned. Standardized intelligence and ability testing and diagnosis and classification have undergone serious questioning but they are so deeply ingrained in the educational system that they have managed to withstand and adapt in response to criticism - culturally sensitive testing and due process, for example. Differences between special and regular education instruction and skills, homogeneous grouping, and segregation have undergone sustained attack, especially since the enactment of PL 94-142. Collaboration between regular and special educators is required with the possible result of demystification of special education skills. Legally, segregation and homogeneous grouping are no longer automatic options. They have to be justified on the grounds that less restrictive environments are considered to be inappropriate. An additional tenet of special education was the channelling of special class students into the vocational stream described as early as 1919 by Cubberley (1919, pp. 401, 460). This tenet remains unquestioned at present.

The current special education services in the U.S. fall on a continuum from less restrictive to more restrictive environments. Primary instruction in regular classes with collaborative assistance and/or part-time assistance in the resource room or special class are considered less restrictive environments. On the other hand, placement in special classes, hospital or home programs, and separate special schools or residential settings are regarded as more restrictive environments (Gearheart, Weishahn, & Gearheart, 1992, pp. 37-40).

A brief description of the referral, evaluation, and intervention process is given here. Usually the teacher, parent, pediatrician or other professional make the suggestion that a student may be facing a learning problem or disabling condition. Many states have official prereferral procedures, even though only for documentation - against legal action - not for substantive purposes. At this stage no formal referral is made. A special educator may provide consultive assistance to the regular teacher. If the student is perceived to respond adequately the process is discontinued and the student is not identified for special education services. If not, a formal referral form is completed and, after parental consent is obtained and due process explained, physical, psychoeducational, and personal-historical assessment is made by a team of professionals typically including teachers, special education teacher, psychologist, social worker, other specialists, and the parents. Following certification of assessment completion and interpretation of results, special needs are identified. If it is judged that the student can benefit from regular education instruction with certain modifications the process is discontinued and records are maintained. If not, the student may be classified if the disability is appraised to result from intrinsic learner characteristics (excluding cultural, social, and environmental ones). In the next stage, special needs are identified in detail, an IEP is constructed with the involvement of parents, and placement in a setting along the continuum is made with parent approval (Gearheart, Weishahn, & Gearheart, 1992, pp. 42-51). This is the ideal procedure but it seems that substantial deviations do take place frequently.

Emerging Themes

The emerging themes in this chapter have been divided in three categories: expansion of special education, factors influencing special education, and intended and unintended consequences. They reflect a set of contradictory developments which have both benefitted and hindered the education of students who have been identified as disabled.

In the first category of emerging themes, the late nineteenth and twentieth centuries represent the period in American education when special services for social groups and individuals with disabilities grew dramatically. Residential facilities had completed their growth by the 1950s under the considerable influence of medical professionals. Special classes were initiated in almost two-thirds of public school systems in the period between 1918 and 1947, although the size of the special education subsystem continued to increase enormously after 1947 and right into the 1980s.

The exceptional population grew sharply since the 1930s and well into the early 1980s. As a comparison indicator U.S. elementary and secondary public school enrollment increased by 75% between 1932 and 1970 (see **Table 2**), whereas the total enrollment in special education programs increased by 1,552% during the same period (see **Table 3**). Despite a decrease of 12% in U.S. public school enrollment between 1970 and 1989 (see **Table 5**), the total enrollment in special education programs increased by 70% during the same period (see **Table 6**). In terms of enrollment numbers, the total population of students with disabilities was 162 thousand in 1932 (see **Table 3**) in comparison with over 4.5 million in 1988-89 (see **Table 6**). These enrollment numbers of the total exceptional student population represented 0.62% in 1932 (calculated from

data in **Tables 2** and **3**) and 11.30% in 1988-89 (see **Table 7**) of the respective total public school enrollments.

In the second category of emerging themes, the following influential factors on special education are included: the menace argument, eugenics, and intelligence testing; ideological commitment of various participants to the extension of special services; federal legislation and funding; and the more recent creation of the learning disability category.

The menace argument, eugenics movement, and intelligence testing were closely linked together during the first two decades of the twentieth century and influenced considerably the direction of special education. By the early 1930s when mental 'defectives' were no longer considered a threat to society, intelligence testing was firmly grounded in public schools. Intelligence tests were used as 'scientific evidence' for diagnosis and classification, ability grouping and tracking, exclusion from regular education, and placement in special programs. In general, they were perceived to improve school efficiency and they played a significant role in the acceleration of tracking in American education. A number of reasons were responsible for the rapid adoption of standardized intelligence and ability testing in schools: unanimity of administrators, educators, and other professionals; immigration; urbanization and industrialization; compulsory schooling legislation; the progressive objectives of efficiency and order; and a considerable degree of racist attitudes toward ethnic, minority, and immigrant groups. Although group intelligence testing is rarely used at present, individual testing is still part of special education assessment.

The ideological commitment to special arrangements for exceptional learners has been a constant in American education for a long time. It is upon this commitment that the whole

philosophy and practice of special education is based. The constitutional elements of this commitment and philosophy are: variability of abilities in the school population, deeply ingrained limitations for some students, education tailored to individual student needs, vocational streaming, diagnosis and classification encompassing standardized intelligence and ability testing, fundamental differences between regular and special education services, homogeneous grouping, and segregation. The first four elements are still largely unquestioned by most special and regular educators. The last four elements, however, have been undergoing renewed attack since the 1970s. Diagnostic and classification procedures have been adapted through the implementation of due process, culturally sensitive testing, and in some instances noncategorical labeling. The elements of differences between special and regular education, homogeneous grouping, and segregation are no longer accepted at face value. They are discussed in more detail in the following chapter.

The statistical information that has been presented in this chapter leads to the interpretation that part of this ideological commitment has been the quest to diminish the initial gap between theoretical estimates and observed occurrence of disabilities. This interpretation seems to be consistent with the fit between theoretical estimates and observed occurrence (see **Table 8**) for the categories of learning disability, mental retardation, and speech impairment representing 77.4% of the total special student population in 1988-89 (calculated from data in **Table 6**). Increases in the size of the emotionally disturbed and preschool handicapped categories, representing 17.0% of the total exceptional student population in 1988-89 (calculated from data in **Table 6**), may be expected in the coming years. The former category was still short of its

theoretical estimate range in 1988-89 (see **Table 8**). The latter, established officially in 1987-88, has been provided with incentives and funding by federal legislation over the last few years.

Federal laws regarding the education of students with a disadvantaged socioeconomic background and/or disabilities have contributed, since the mid-1960s, to the expansion of special education programs by providing incentives and funding. Legislation has encouraged the identification and categorical classification of students in need of compensatory education and has made funding conditional upon such classification. Without doubt PL 94-142 and subsequent legislation have had a positive impact on the rights of students with disabilities and their parents by introducing the concepts of Least Restrictive Environment and due process. Nevertheless, they have also had a negative impact by inviting the active pursuit of identification and classification, creating a maze of bureaucratic regulations and procedures, and furthering the influence of professional authority.

A recent example of active pursuit of identification has been the learning disability label. The overall growth of the special student population during the 1970s and 1980s was mainly due to the augmentation of the learning disability category. In 1976-77 it accounted for 21.6% of the total exceptional student population while in 1988-89 for 43.6 percent (see **Table 6**). It has been suggested that the definition and diagnostic procedures of learning disability are vague and erratic and that it has functioned as a convenience category of classification for a wide range of learning problems. Irrespective of scientific controversies over the legitimacy of learning disability, it has been one of the most important factors in the enlargement of special education during the 1970s and 1980s.

In the third category of emerging themes, intended and unintended consequences are addressed. The intended consequences have been: the expansion of special education, due process, Least Restrictive Environment, and continuum of special services. The unintended consequences have been: 'head-hunting' and creation of disability, bureaucratic expansion, and extension of professional authority over students with disabilities and their parents.

The first intended consequence, the expansion of special education services has been a constant of American education throughout the period after the Civil War to the present. Whether the target population was 'vagrant' or 'incurable' delinquent youngsters, immigrant or minority 'deviants', 'mental defectives' or 'morons', 'cripples' or 'learning disabled', participants of American education have always sought to arrange special services that would meet their exceptional needs. The ingredients of this enterprise - social control and order, concern with appropriate education, and school efficiency - have been variably pronounced depending on social-historical and 'scientific' circumstances. Both social control and educational amelioration have been inherent in the intentions and outcomes of special education.

With respect to due process and the Least Restrictive Environment, parents have gained the legal right to claim the placement of their children in the most appropriate environment and challenge placements they perceive as unsuitable. Federal legislation mandates free public appropriate education for all students with disabilities. The definition of 'appropriate education' encompasses the whole continuum of special services from the most to the least restrictive. In fact, the law requires the existence of the entire continuum of services.

'Head-hunting' has been one of the unintended consequences of incentives and financial assistance provided by federal legislation. It has amplified the size of the special student

population, best exemplified by the learning disability category. It has contributed significantly to the process of creation and/or magnification of disabilities, especially among disadvantaged and minority groups. No doubt disabilities exist, but the proportion of the population that is seriously hampered is greatly overestimated. The theoretical estimates of the various disabilities are based on arbitrary constructs of intelligence testing and Gaussian mathematics. These constructs are historically arbitrary in the sense that they are in turn based on a particular social view propounded initially by advocates who lived in the period of the menace scare and the eugenics movement. These estimates, having lost their social origins in the minds of many educators because of the ensuing historical gap, have been transferred with slight modifications into our own era not as theory but as reality. In combination with a pronounced commitment to special education, theoretical estimates of disability have been translated into observed occurrence.

The other two unintended consequences of excessive bureaucratization and extension of professional authority have added to a sense of minimized empowerment by exceptional students and their parents. Most parents have to depend on professionals - lawyers, psychologists, administrators, special educators - for interpretation of their rights and the complicated bureaucratic procedures. On the one hand, parents and their children have gained right to due process but on the other they have been made more dependent on professional authority.

Has then, the system of American education become progressively more inclusive of children with disabilities, as it is widely assumed (e.g. Reynolds & Birch, 1977, 1982; Schulz, Carpenter & Turnbull, 1991, p. 6)? The answer depends on the issues to be examined when defining the term 'inclusion'. A simple contemplation on the numbers of students enrolled in

public schools over the last 130 years would result in a positive response. There are proportionately many more students with or without disabilities in public schools today than a hundred years ago.

An examination of whether public schools provide students with disabilities with similar or equal opportunities as their nondisabled peers for independent living, however, would not result in a straightforward answer. Until the 1940s or even early 1950s most students, who nowadays would be identified as disabled and would be served in special education programs, were in regular classes. In terms of socialization benefits, proportionately many more students of the total public school population had the opportunity to be prepared for real life (experiences available to most individuals) until the 1940s and 1950s than in the 1960s and mid-1970s. Prior to the early 1950s, simply many less students were pulled out of regular classes and placed in special classes or schools.

Inclusion in public schools through special programs does not necessarily imply beneficial inclusion. If special education arrangements do not operate in real life situations, as it has been charged of separate classes, then they are largely exclusive. This has been the case for most special students until the enactment of PL 94-142. Until 1975 American public education, in practice, had become progressively more exclusive for most students with disabilities by higher identification rates and placement in separate classes.

After 1975 American special education has been embroiled in further contradictions. It has adopted less restrictive placements as legitimate options while at the same time it has increased substantially the percentage of the total public school population served in special

programs. Inertia, funding patterns, and traditional special education philosophy have contributed to such a contradictory development.

Thus, the answer to the question of whether current American public education is more inclusive than in the past cannot be a clear positive or negative response. The evolution of special education, both in theory and practice, has been contradictory. One thing, nonetheless, remains certain; the high degree of consensus that existed before the late 1960s has disappeared. Complete segregation models still exist, middle-of-the-road mainstreaming has become fashionable, and full inclusion models are openly advocated. The latter two approaches are discussed in the following chapter.

CHAPTER 6

PL 94-142, Mainstreaming, and Inclusive Education

Brief Historical Background

After the establishment of compulsory public education laws in most states in the U.S. almost all children with disabilities were excluded from common schools (Sigmon, 1983). The naive explanation has been suggested that "special education was an outgrowth of a "do-gooder" mind-set, in that professionals dealing with students defined as having disabilities felt sorry for them and so decided to establish special programs for them" (Flynn & Kowalczyk-McPhee, 1989, p. 29). Previous chapters have discussed how the establishment of special education was the result of a complex of interrelated social-historical factors rather than a "do-gooder" mentality. Humanitarian motives might have played a limited role but their explanatory power remains at a rather superficial level.

According to Hahn (1989) there are two perspectives on disabilities in the field of special education. The 'functional limitations' perspective uses medical and economic concepts. It has been expressed in government policies throughout the years back to at least World War I when individuals with disabilities were prepared for entry-level jobs without any substantial opportunities for advancement. The major emphasis of the 'functional limitations' viewpoint is on changing individuals with disabilities to conform to the existing environment. The 'minority group' perspective, on the other hand, uses sociopolitical concepts that imply the modification of existing discriminatory environments to accommodate the needs of persons with disabilities.

This perspective has gained more credibility the last few decades, especially after civil rights became a major issue in the U.S. in the 1960s.

In 1968 an influential article by Dunn (1968) attacked special education practices for mildly disabled students as 'morally and educationally wrong' and as having failed dramatically. A year later special education for severely disabled students was also under assault (Christoplos & Renz, 1969). In the following years many researchers and reviewers of the pertinent literature came to the conclusion that special education settings offer little or no benefit to students with disabilities (Bickel & Bickel, 1986; Cariberg & Kavale, 1980; Cegelka & Tyler, 1970; Epps & Tindal, 1987; Glass, 1983; Kavale & Glass, 1982; Leinhardt & Pally, 1982; Morsink, Soar, Soar, & Thomas, 1986; Weiner, 1985). Ivan Illich (1970) even argued that special education does not have the effect of helping disadvantaged children. On the contrary, it creates a situation of dependency with the consequence of making these children more disadvantaged (p. 254).

As a response to the failure of segregated placements, 'mainstreaming' came to be seen as an alternative. Even though the term mainstreaming gained widespread use in the early 1970s, its practice, in the preceding period, was already established for some students with physical, visual, and hearing disabilities (Gearheart, Weishahn, & Gearheart, 1992, p. 10). Since then, however, the term has acquired a variety of meanings from returning all students with disabilities to regular classrooms, maximum possible integration depending on the individual needs of the student (Gearheart, Weishahn, & Gearheart, 1992, p. 5) to what teachers consider 'reasonable mainstreaming accommodations' (Fagen, Graves, Healy, & Tessier-Switlick, 1986).

In 1975 the *Education for All Handicapped Children Act* (PL 94-142) was passed. During the preceding years, court rulings such as *Brown v. Board of Education* (1954), *Hobson v.*

Hansen (1967), *Diana v. State Board of Education* (1970, 1973), *Mills v. D.C. Board of Education* (1972), *Pennsylvania Association for Retarded Children v. Commonwealth of Pennsylvania* (1971, 1972) had already set the stage. Many of the positive litigation outcomes with regard to mainstreaming have been reviewed by Gilhool (1989). It has been asserted that the sociopolitical climate of the 1960s and 1970s, favoring sensitivity to civil rights, played a large role in the rationale of the court rulings and federal and state laws (Miller & Switzky, 1979; A. P. Turnbull, 1982).

In 1986 Madeleine Will (1986), then assistant secretary of the Office of Special Education and Rehabilitative Services, launched the Regular Education Initiative (REI). In her words,

[t]he heart of this commitment is the search for ways to serve as many of these children as possible in the regular classroom by encouraging special education and other special programs to form a partnership with regular education. The objective of the partnership for special education and the other special programs is to use their knowledge and expertise to support regular education in educating children with learning problems (p. 20).

During the last decade earnest arguments were expressed to integrate all students, regardless of level of disability, into regular classrooms (e.g. Berres & Knoblock, 1987; Forest, 1987; Stainback & Stainback, 1988). The ensuing obstacles presented by the dichotomy of regular and special education have persuaded some researchers and advocates of mainstreamed education that the next logical step would be the 'merging' of these two branches (e.g. Sapon-Shevin, Pugach, & Lilly, 1987; Stainback & Stainback, 1984; Stainback & Stainback, 1989a). The *Individuals with Disabilities Education Act* (PL 101-476) of 1990, even though making some changes in the definition of disabilities by substituting the term 'handicapped' with 'disabled', has left the fundamentals of PL 94-142 the same. In this chapter, the outcomes of PL 94-142 are examined in connection with mainstreaming practices and models. Particular attention is given

to the barriers to the merger option, and the concepts of networking and professional collaboration as conveyed in the mainstreaming literature.

PL 94-142 and the Normalization Principle

The initial intent of PL 94-142 was to achieve four long-term goals: a free appropriate public education to all disabled children, protection of the rights of disabled children and their parents, assistance to state and other local agencies for provision of special educational services, and assessment of the efforts to educate disabled children (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1980, p. 107).

The law mandated the education of disabled students in the Least Restrictive Environment (LRE) as stated in its integration principle clause:

- 1. That to the maximum extent appropriate, handicapped children, including children in public or private institutions or other care facilities, are educated with children who are not handicapped; and*
- 2. That special classes, separate schooling, or other removal of handicapped children from the regular educational environment occur only when the nature of severity of the handicap is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactorily* (Federal Register, 1977; p. 42497).

PL 94-142 attempted to encompass the principle of normalization. As formulated by Nirje (1976) and Wolfensberger (1972), normalization means giving disabled people the opportunity to live a life as close to the norm as possible, regardless of the degree of disability. More specifically, it implies a normal routine for every day throughout the year, normal developmental experiences of the life cycle, respect for the choices and wishes of the disabled, mixing of the two sexes, availability of economic opportunities, and conformity of residential and school

facilities to the standards of ordinary citizens. According to Wolfensberger (1972) normalization cannot be achieved without the physical and social integration of disabled individuals into the community.

Application and Outcomes of PL 94-142

In retrospect, the outcomes of PL 94-142 have been contradictory. On the one hand, the "education [of children with disabilities] is now seen as the appropriate responsibility of public education" (Lipsky & Gartner, 1989b, p. 283) and procedural mechanisms have been established to protect the rights of students with disabilities and those of their parents. In an analysis of PL 94-142 and other relevant legislation, H. Turnbull (1986) summarized six main tenets of American special education law: zero reject, the right of all children to free, appropriate education; appropriate assessment, the right to nondiscriminatory evaluation; IEP, the right to individualized education according to student needs; LRE, the right to proper educational placement; due process, the right of challenging inappropriate placement; and parental participation, the right of parental involvement in educational planning and implementation.

On the other hand, it is perceived by many advocates that there has been a failure in applying the mainstreaming intent of the law by narrow interpretations which have favored segregation, overidentification, and further bureaucratization. The existing structure of American education, in combination with practices and attitudes of most of its participants, has tended to favor rather than discourage restrictive placements of exceptional students (Biklen, 1992, pp. 87-88; Villa & Thousand, 1990). As L. J. Walker (1987) has commented,

PL 94-142 and other public policies of the time did not anticipate the need to take special steps to eliminate turf, professional, attitudinal, and knowledge barriers within public education. It did not anticipate that the artifice of delivery systems in education might drive the maintenance of separate services and keep students from the mainstream, that the resource base of special education and other remedial services would be constrained by economic forces, or that special education might continue to be dead-end programs in many school districts. Nor could it anticipate how deeply ingrained were our assumptions about the differences between students with learning problems and those without, and the substantial power of high (or, unfortunately, low) expectations in learning (p. 109).

Put more simply, "[t]eacher training programs in general and in special education, the absence of alternative models and paradigms of integration, made unlikely any other outcome" (Lipsky & Gartner, 1989c, p. 10).

In the *Ninth Annual Report to Congress on the Implementation of the Education of the Handicapped Act*, it was clearly indicated that out of the twenty-five states in which data collection took place "[v]irtually every state had significant problems meeting its LRE responsibilities" (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1987, p. 166). In the same report the following were pointed out:

Evidence suggests that states have not established procedures to ensure that the removal of handicapped children from the regular education environment is justified (p. 166).

Reviews of some individual student records in these states also revealed a substantial lack of evidence that LRE is even considered before a placement is made. On the contrary, some placements seem to be made on the basis of the handicapping condition or for administrative convenience (p. 178).

In the same realm, funding patterns have reinforced the trends of overidentification and misclassification of students - what could justifiably be termed 'head-hunting'. Not only has the law failed to accomplish the objective of educating students with disabilities in the LRE, it has also contributed to the increase of the special student population. According to existing practices,

funding for special education services to specified students is contingent upon identification. Financial assistance to secure these services cannot be offered unless students have been identified and classified. In the *Second Annual Report to Congress on the Implementation of the Education for All Handicapped Children Act* it was stated:

Across age levels, there are indications that regular classrooms still contain a certain number of unidentified handicapped children who need special education services, and additional effort will be necessary to identify and serve them. That effort will be facilitated by a newly launched study which will focus on exemplary practices in identifying and assessing handicapped children (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1980, pp. 108-109).

Even the procedural rights, according to L. J. Walker (1987), were established in the wrong system - that of special education - "which remains in many instances outside the normal scope of school business" (p. 108). The result has been expansion of special education bureaucracy with restrained sensitivity to the needs of exceptional students or effort to keep them in the regular classroom.

Several advocates of mainstreaming have come to the conclusion that existing legislation has either not been implemented according to its intent (Asch, 1989) or that it is not progressive enough (Lipsky & Gartner, 1989b; S. J. Taylor, 1988). In fact, Ballard and Zettel (1977), just two years after the passage of PL 94-142, had pointed out that the LRE principle was not a requirement for mainstreaming and that it would not mandate the placement of all students with disabilities in the regular classroom.

Implementation of PL 94-142 and Educational Placements

Identifying students as disabled is not necessarily detrimental provided that the objectives of the existing educational system are compatible with the intent of the law of furnishing a "free *appropriate* [emphasis added] public education" (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1991, p. xv). If the philosophy of service delivery models and practices is geared toward inclusion of individuals with disabilities it may be beneficial. Nevertheless, evidence seems to indicate that the current American educational system as a whole is considerably antagonistic to the concepts of mainstreaming, integration, and inclusive education.

One of the indicators that may be used to assess the success or failure of PL 94-142 is educational placement of students who have been identified as disabled. If there have been any significant changes in placement patterns toward less restrictive environments after the enactment of the law, it would be evidence that the law has succeeded in its intent that "handicapped children are to be educated with children who are not handicapped" (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1980, p. 109). This, however, does not seem to be the case. From 1976-77 to 1986-87, educational placement statistics for students with disabilities have remained virtually unchanged (Lipsky & Gartner, 1989c). After the various educational placements are defined below, a detailed exposition of educational placement statistics from 1977-78 to 1988-89 is given.

Definitions of Educational Environments

The Office of Special Education Programs has set specific definitions regarding the various educational placements. Students are regarded to be in the *regular class* placement category when they are educated primarily within the regular classroom and receive special education for no more than twenty-one percent of the school day inside or outside the regular class. In the *resource room* category, students receive special education for twenty-one to sixty percent of the school day in resource rooms with part-time teaching in the regular classroom (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1991, pp. 20-21).

When students receive full-time or more than sixty percent instruction in self-contained special classes within a regular school campus they are in the *special class* category. Students are classified in the *separate school facility* placement category when they receive more than fifty percent of their education in a separate day school for students with disabilities. Students in the *residential facility* category receive their education in public or private residential facilities at public expense for more than fifty percent of the school day. In *homebound/hospital* placements students receive their education mainly through programs in these environments (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1991, p. 21). Placements become more restrictive from regular class to homebound/hospital environments.

National Placement Trends for the Various Disability Categories

In Tables 9, 10, 11, and 12 national statistics are presented with regard to placement of students with disabilities in the various educational environments during academic years 1977-78,

TABLE 9

**Percentage Distribution of Disabled Students
3 to 21 Years Old Receiving
Special Education Services by Educational
Environment: 1977-78**

	Regular Class & Resource Room ¹	Separate Class	Separate Facilities	Other Separate Environments	Separate Facilities & Other Separate Environments Combined
Mentally Retarded	36.2%	52.8%	9.4%	1.6%	11.0%
Seriously Emotionally Disturbed	43.9%	40.5%	12.0%	3.6%	15.6%
Orthopedically Handicapped	37.0%	30.2%	9.5%	23.2%	32.8%
Other Health Impaired	49.9%	27.3%	6.7%	16.1%	22.8%
Speech Impaired	91.4%	7.7%	0.6%	0.3%	0.9%
Hard of Hearing and Deaf	37.6%	35.2%	24.1%	3.2%	27.3%
Visually Handicapped	61.1%	19.7%	15.3%	3.9%	19.2%
Learning Disabled	79.5%	18.7%	1.6%	0.2%	1.8%
Multihandi- capped	26.1%	61.7%	3.8%	8.4%	12.2%
Deaf-Blind	19.5%	39.1%	39.7%	1.7%	41.4%
All Conditions	68.0%	25.3%	4.7%	2.0%	6.7%

¹ Percentages in the Source are not given separately for regular class and resource room placements

SOURCE:

U.S. Department of Education, Office of Special Education and Rehabilitative Services. (1980). *Second annual report to Congress on the implementation of Public Law 94-142: The Education for All Handicapped Children Act*. Washington, DC: Author, pp. 169-198.

TABLE 10

**Percentage Distribution of Disabled Students
3 to 21 Years Old Receiving Special
Education Services by Educational
Environment: 1984-85**

	1 Regular Class	2 Resource Room	3 Col- umns 1 & 2 Com- bined	4 Separ- ate Class	5 Public Separate School Facility	6 Other Separ- ate Envi- ron- ments ¹	7 Col- umns 5 & 6 Com- bined
Mentally Retarded	4.8%	28.1%	32.9%	53.0%	8.4%	5.7%	14.1%
Seriously Emotionally Disturbed	11.8%	34.3%	46.1%	33.3%	8.6%	12.1%	20.7%
Orthopedically Handicapped	18.2%	20.7%	38.9%	33.6%	13.1%	14.4%	27.5%
Other Health Impaired	23.5%	25.5%	49.0%	32.8%	4.0%	14.2%	18.2%
Speech Impaired	64.8%	25.3%	91.1%	4.9%	1.0%	3.0%	4.0%
Hard of Hearing and Deaf	21.3%	23.6%	44.9%	30.5%	7.3%	17.3%	24.6%
Visually Handicapped	32.7%	29.6%	62.3%	18.7%	4.1%	14.9%	19.0%
Learning Disabled	16.2%	60.7%	76.9%	20.9%	1.1%	1.2%	2.3%
Multihandicapped	2.8%	13.7%	16.5%	44.1%	18.3%	21.0%	39.3%
Deaf-Blind	4.6%	15.8%	20.4%	23.7%	16.6%	39.3%	55.9%
All Conditions	26.3%	41.6%	68.5%	23.7%	3.5%	4.5%	8.0%

¹ Includes the following segregated facilities: Private separate schools, public residential facilities, private residential facilities, correction facilities, and homebound/hospital environments

SOURCE:

U.S. Department of Education, National Center for Education Statistics. (1988). *Digest of education statistics, 1988*. Washington, DC: Government Printing Office, p. 57.

TABLE 11

Percentage Distribution of Disabled Students 3 to 21 Years Old¹ Receiving Special Education Services by Educational Environment: 1987-88

	1 Regular Class	2 Resource Room	3 Col- umns 1 & 2 Com- bined	4 Separ- ate Class	5 Public Separate School Facility	6 Other Separ- ate Envi- ronments ²	7 Col- umns 5 & 6 Com- bined
Mentally Retarded	5.8%	23.5%	29.3%	57.9%	10.3%	1.7%	12.0%
Seriously Emotionally Disturbed	12.6%	32.9%	45.5%	34.5%	9.0%	11.1%	20.1%
Orthopedically Handicapped	27.7%	18.0%	45.7%	32.0%	10.6%	11.1%	21.7%
Other Health Impaired	30.6%	20.8%	51.4%	18.7%	7.8%	22.0%	29.8%
Speech Impaired	74.9%	19.7%	94.6%	3.8%	0.3%	1.1%	1.4%
Hard of Hearing and Deaf	30.5%	1.9%	32.4%	43.4%	15.5%	11.1%	26.6%
Visually Handicapped	37.9%	25.2%	63.1%	21.0%	3.6%	12.2%	15.8%
Learning Disabled	17.6%	59.0%	76.6%	21.8%	0.9%	0.4%	1.3%
Multihandi- capped	6.5%	13.6%	20.1%	46.6%	20.7%	12.7%	33.4%
Deaf-Blind	8.9%	6.3%	15.2%	36.8%	18.8%	29.2%	48.0%
All Conditions Without Preschool Handicapped	29.1%	40.0%	69.1%	24.7%	3.5%	2.9%	6.4%
All Conditions Including Preschool Handicapped (3-5 years)	29.7%	38.2%	67.9%	25.0%	5.6%	1.6%	7.2%

¹ Beginning in 1987-88, States are no longer required to report preschool handicapped students (0-5 years by handicapping condition. Thus, the various handicapping conditions in the table include 6-21 year old students only

² Includes the following segregated facilities: Private separate schools, public residential facilities, private residential facilities, and homebound/hospital environments

SOURCES:

U.S. Department of Education, National Center for Education Statistics. (1990). *Digest of education statistics, 1990*. Washington, DC: Government Printing Office, p. 64.

U.S. Department of Education, Office of Special Education and Rehabilitative Services. (1991). *Thirteenth annual report to Congress on the implementation of the Individuals with Disabilities Education Act*. Washington, DC: Author, p. 23.

TABLE 12

**Percentage Distribution of Disabled Students
3 to 21 Years Old¹ Receiving Special
Education Services by Educational
Environment: 1988-89**

	1 Regular Class	2 Resource Room	3 Col- umns 1 & 2 Com- bined	4 Separ- ate Class	5 Separate School Facility	6 Other Separ- ate Envi- ron- ments ²	7 Col- umns 5 & 6 Com- bined
Mentally Retarded	5.9%	22.4%	28.3%	58.9%	11.3%	1.6%	12.9%
Seriously Emotionally Disturbed	14.1%	30.0%	44.1%	35.8%	13.4%	6.7%	20.1%
Orthopedically Handicapped	29.3%	18.6%	47.9%	33.5%	11.1%	7.6%	18.7%
Other Health Impaired	29.9%	20.3%	50.2%	19.6%	7.8%	22.4%	30.2%
Speech Impaired	75.9%	19.2%	95.1%	3.3%	1.4%	0.2%	1.6%
Hard of Hearing and Deaf	26.9%	21.0%	47.9%	33.5%	8.5%	10.0%	18.5%
Visually Handicapped	52.0%	17.9%	69.9%	21.5%	3.4%	5.2%	8.6%
Learning Disabled	19.6%	57.9%	77.5%	20.9%	1.3%	0.2%	1.5%
Multihandi- capped	7.0%	14.1%	21.1%	46.2%	25.9%	6.8%	32.7%
Deaf-Blind	11.6%	5.3%	16.9%	29.9%	25.9%	27.3%	53.2%
All Conditions Without Preschool Handicapped	30.5%	39.0%	69.5%	24.3%	4.6%	1.7%	6.3%
All Conditions Including Preschool Handicapped (3-5 years)	31.3%	37.3%	68.6%	24.4%	5.2%	1.7%	6.9%

¹ Beginning in 1987-88, States are no longer required to report preschool handicapped students (0-5 years by handicapping condition. Thus, the various handicapping conditions in the table include 6-21 year old students only

² Includes the following segregated facilities: Public residential facilities, private residential facilities, and homebound/hospital environments

SOURCE:

U.S. Department of Education, Office of Special Education and Rehabilitative Services. (1991). *Thirteenth annual report to Congress on the implementation of the Individuals with Disabilities Education Act*. Washington, DC: Author, pp. 23, 27.

1984-85, 1987-88, and 1988-89 respectively. For students under the mental retardation label there has been a consistent decrease in the combined regular class and resource room placements over the years from 36.2% in 1977-78 (**Table 9**) to 28.3% in 1988-89 (**Table 12**). This decrease may be attributed to the incorporation of many students, who in the past would have been classified as mildly mentally retarded, into the learning disability category. The remaining students in the mental retardation category have more severe disabilities with the implication that they are served in more restrictive environments (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1991, pp. 16, 24, 26).

In the seriously emotionally disturbed category the combined regular class and resource room placements, after a small increase from 43.9% in 1977-78 (**Table 9**) to 46.1% in 1984-85 (**Table 10**), there was a decrease to 45.5% in 1986-87 (**Table 11**). During 1988-89 there was a further decline to 44.1% (**Table 12**) close to 1977-78 levels. In special class placement there has been a decrease of almost five percentage points between 1977-78 and 1988-89, while the combined separate facilities and other separate environment placements have increased from 15.6% (**Table 9**) to 20.1% (**Table 12**) during the same period.

In the orthopedically handicapped category, there has been an increase of almost 11 percentage points in the combined regular class and resource room placements from 37% in 1977-78 (**Table 9**) to 47.9% in 1988-89 (**Table 12**). Regular class placement grew from 18.2% in 1984-85 (**Table 10**) to 29.3% in 1988-89 (**Table 12**). At the same time there was a steady decline in the combined separate facilities and other separate environment placements from 32.8% in 1977-78 (**Table 9**) to 18.7% in 1988-89 (**Table 12**), while special class placement remained at approximately the same level over the years.

With regard to other health impairments, there has been no notable change in the percentage of combined regular class and resource room placements: 49.9% in 1977-78 (**Table 9**) and 50.2% in 1988-89 (**Table 12**). However, there has been a growth in regular class placement from 23.5% in 1984-85 (**Table 10**) to 29.9% in 1988-89 (**Table 12**) and a decrease in special class placement of almost eight percentage points from 1977-78 to 1988-89 (see **Tables 9 & 12**). In contrast, there was an increase in the combined separate facilities and other separate environment placements from 22.8% in 1977-78 (**Table 9**) to 30.2% in 1988-89 (**Table 12**).

In the speech impairment category the overwhelming majority of students has been served in regular class and resource room placements over the years: 91.4% in 1977-78 (**Table 9**) and 95.1% in 1988-89 (**Table 12**). There has been an increase of approximately 11 percentage points in regular class placement from 64.8% in 1984-85 (**Table 10**) to 75.9% in 1988-89 (**Table 12**). Special class placement has declined from 7.7% in 1977-78 (**Table 9**) to 3.3% in 1988-89 (**Table 12**).

In the hard of hearing and deaf category there has been an increase of approximately ten percentage points in the combined regular class and resource room placements from 37.6% in 1977-78 (**Table 9**) to 47.9% in 1988-89 (**Table 12**). Between 1984-85 and 1988-89 there was a growth of more than five percentage points in regular class placement (see **Tables 10 & 12**). Special class placement has fluctuated slightly over the years, except for 1987-88 when it had increased to 43.4% (**Table 11**), to stand at 33.5% in 1988-89 (**Table 12**) which approximates the statistic of 35.2% in 1977-78 (**Table 9**). The combined separate facilities and other separate environment placements remained relatively constant over the years (26.6% in 1987-88, **Table 11**) but there was a substantial decrease to 18.5% in 1988-89 (**Table 12**).

In the visually handicapped category there has been an increase in the combined regular class and resource room placements from 61.1% in 1977-78 (**Table 9**) to 69.9% in 1988-89 (**Table 12**). A considerable increase of more than 19 percentage points has been reported between 1984-85 (32.7%, **Table 10**) and 1988-89 (52%, **Table 12**) in regular class placement. Special class placement has remained at approximately the same level over the years to stand at 21.5% in 1988-89 (**Table 12**). The combined separate facilities and other separate environment placements, on the other hand, have decreased to 8.6% in 1988-89 (**Table 12**) from 19.2% in 1977-78 (**Table 9**).

With respect to the learning disability category, there has been little or no change over the years. The combined regular class and resource room placements have declined slightly to 77.5% in 1988-89 (**Table 12**) from 79.5% in 1977-78 (**Table 9**). A small increase of regular class placement has been reported from 16.2% in 1984-85 (**Table 10**) to 19.6% in 1988-89 (**Table 12**). Special class placement has also increased slightly from 18.7% in 1977-78 (**Table 9**) to 20.9% in 1988-89 (**Table 12**), while the combined separate facilities and other separate environment placements have remained consistent over the years to stand at 1.5% in 1988-89 (**Table 12**).

In the multihandicapped category there has been a decline in the combined regular class and resource room placements to 21.1% in 1988-89 (**Table 12**) from 26.1% in 1977-78 (**Table 9**). Regular class placement has grown from 2.8% in 1984-85 (**Table 10**) to 7% in 1988-89 (**Table 12**). Special class placement has decreased from 61.7% in 1977-78 (**Table 9**) to 46.2% in 1988-89 (**Table 12**) but the combined separate facilities and other separate environment placements have increased significantly from 12.2% (**Table 9**) to 32.7% (**Table 12**) during the same period.

In the deaf-blind category the combined regular class and resource room placements have decreased from 19.5% in 1977-78 (**Table 9**) to 16.9% in 1988-89 (**Table 12**). Regular class placement has increased from 4.6% in 1984-85 (**Table 10**) to 11.6% in 1988-89 (**Table 12**). Special class placement has fluctuated over the years to stand at 29.9% in 1988-89 (**Table 12**) in comparison to 39.1% in 1977-78 (**Table 9**). The combined separate facilities and other separate environment placements have increased from 41.4% in 1977-78 (**Table 9**) to 53.2% in 1988-89 (**Table 12**).

Based on 1988-89 statistics (**Table 12**), recent placement patterns of the disability categories differ widely. Students with mild to moderate disabilities are primarily served in less restrictive environments (learning disabilities, speech impairments, visual handicaps) in contrast to students with severe disabilities (mental retardation, multihandicaps, deaf-blindness) who are served in more restrictive settings. Students identified under the serious emotional disturbance category tend to be placed in more restrictive environments, while those in the orthopedic handicap, other health impairment, and hard of hearing and deaf categories tend to be placed approximately equally between less restrictive and more restrictive settings. In terms of age, students with disabilities in older-age groups tend to be placed in more restrictive environments than students with disabilities in younger-age groups (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1980, pp. 39-40; 1986, pp. 9, 11; 1991, pp. 21-25).

The placement trends for the various disability categories also vary widely for the period between 1977-78 and 1988-89 as it is evident from statistics in **Tables 9, 10, 11, and 12**. Improvement from more restrictive to less restrictive environments has occurred in the orthopedic handicap, speech impairment, hard of hearing and deaf, and visual handicap categories. Little or

no change in placement trends has been evident in the learning disability category, whereas regression from less restrictive to more restrictive placements has occurred in the serious emotional disturbance and mental retardation categories (cautionary interpretation for mental retardation category is noted above). Contradictory developments have occurred in the health impairment, multihandicap, and deaf-blind categories in which movement toward less restrictive and more restrictive placements has simultaneously occurred.

In terms of average national statistics for all disability categories as a single group, it appears that there has been little or no change in placements in the period between 1977-78 and 1988-89. The combined regular class and resource room placements have remained constant over the years: 68% in 1977-78 (**Table 9**) and 68.6% in 1988-89 (**Table 12**) with an increase of approximately four percentage points in regular class placement and a corresponding decrease of about four percentage points in resource room placement during the period between 1984-85 and 1988-89 (**Tables 10 and 12**). Special class placement was 25.3% in 1977-78 (**Table 9**) and 24.4% in 1988-89 (**Table 12**). The combined separate facilities and other separate environment placements were 6.7% in 1977-78 (**Table 9**) and 6.9% in 1988-89 (**Table 12**).

Placement of Students with Disabilities at the State Level

What is not apparent in the average national statistics is the wide variability among states in the distribution of students with disabilities to the various educational environments. This variability has been pointed out over the years (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1980, p. 43; 1991, pp. 26, 28-29). The information presented in **Table 13** has been compiled from data reported in the *Thirteenth Annual Report to*

TABLE 13

**State Percentage Distribution of Disabled Students 3 to 21 Years Old
in Regular Class and Combined Regular Class and Resource Room
Placements: 1988-89**

	Regular Class			Regular Class & Resource Room Combined		
	Less than 30%	31% to 50%	More than 50%	Less than 30%	31% to 50%	More than 50%
Alabama	0.00%			71.60%		
Alaska			56.69%			84.79%
Arizona	9.92%			72.75%		
Arkansas		42.56%				82.61%
California	28.44%			68.55%		
Colorado	25.10%				76.42%	
Connecticut		49.06%		67.68%		
Delaware	29.74%			68.62%		
D.C.	19.55%			45.05%		
Florida		31.08%		64.63%		
Georgia	1.09%			70.90%		
Hawaii		36.05%		72.07%		
Idaho			55.95%			82.64%
Illinois	27.78%			59.49%		
Indiana		38.46%		67.69%		
Iowa	22.97%					80.82%
Kansas		40.11%		70.58%		
Kentucky		31.25%				81.38%
Louisiana		37.19%		56.48%		
Maine			51.37%			81.47%
Maryland		43.23%		62.07%		
Mass.			59.89%		74.93%	
Michigan		39.64%		66.89%		
Minnesota	15.89%				74.76%	
Mississippi		36.71%			74.47%	
Missouri		38.32%			73.31%	
Montana			55.52%			80.30%
Nebraska			60.87%			81.92%
Nevada	24.81%				79.04%	
N. Hampshire			51.35%	71.38%		
N. Jersey		38.45%		58.94%		
N. Mexico			50.56%			80.43%
N. York	7.51%			41.41%		
N. Carolina		49.25%			78.64%	
N. Dakota			70.68%			80.38%
Ohio		35.27%		58.94%		
Oklahoma			50.12%		79.61%	
Oregon			58.95%			84.56%
Pennsylvania		37.93%		66.01%		
Puerto Rico	10.60%			54.78%		
Rhode Island			51.39%	66.11%		
S. Carolina		34.37%			75.36%	
S. Dakota	8.58%					83.69%
Tennessee		45.34%			78.63%	
Texas	3.78%					81.06%
Utah		39.86%				80.03%
Vermont			75.28%			82.89%
Virginia		40.72%		67.77%		

Table 13 (cont'd)

	Regular Class			Regular Class & Resource Room Combined		
	Less than 50%	51% to 80%	More than 80%	Less than 50%	51% to 80%	More than 80%
Washington		41.52%			76.00%	
W. Virginia		46.79%			78.09%	
Wisconsin		31.06%		69.39%		
Wyoming		35.81%				81.44%
A. Samoa			60.18%	70.66%		
Guam		36.54%		71.42%		
N. Marianas	23.47%			49.82%		
Virgin Isles	11.43%			28.96%		
Bureau of Indian Affairs	13.67%					88.56%

SOURCE: U.S. Department of Education, Office of Special Education and Rehabilitative Services. (1991). *Thirteenth annual report to Congress on the implementation of the Individuals with Disabilities Education Act*. Washington, DC: Author, p. A-54.

Congress on the Implementation of the Individuals with Disabilities Education Act (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1991, p. A-54). These data pertain to the placement of students with disabilities in the regular classroom and resource room in the various states during the academic year 1988-89. Across states the proportion of regular class placement ranged from a low of 0.00% in Alabama to a high of 75.28% in Vermont. The range of the proportion of combined regular class and resource room placements extended from a low of 28.96% in the Virgin Islands to a high of 88.56% in the Bureau of Indian Affairs.

Based on these data, a state classification scheme was developed. The main purpose of this scheme was to discern state patterns of inclusiveness of students with disabilities as defined by regular and resource room placements. For regular class placement, states were classified according to the following cut-off points: less than 30%, 31% to 50%, and more than 50 percent. For the combined regular class and resource room placements states were classified according to the following cut-off points: less than 73%, 73% to 80%, and more than 80 percent. These specific cut-off points were selected because they fit the data in a manner that can more or less differentiate state practices with regard to LRE placement.

The following categories and criteria for category inclusion were used to group states: (1) **High Incidence of Inclusive Education (HIIE)** - more than 50% statistic in regular class placement and more than 80% statistic in combined regular class and resource room placements; (2) **Moderate Incidence of Inclusive Education (MIIE)** - 31% to 50% statistic in regular class placement and 73% to 80% statistic in combined regular class and resource room placements; (3) **Low Incidence of Inclusive Education (LIIE)** - less than 30% statistic in regular class

placement and less than 73% statistic in combined regular class and resource room placements;

(4) Contradictory Practices (CP) - either less than 30% statistic in regular class placement and more than 80% statistic in combined regular class and resource room placements, or more than 50% statistic in regular class placement and less than 73% statistic in combined regular class and resource room placements.

The results of this classification scheme are presented in **Table 14** in which states are grouped according to the incidence of inclusive education for the academic year 1988-89. In the category of HIIE the following states were grouped: Alaska, Idaho, Maine, Montana, Nebraska, New Mexico, North Dakota, Oregon, and Vermont. In the category of LIIE the following were clustered: Alabama, Arizona, California, Delaware, the District of Columbia, Georgia, Illinois, New York, Puerto Rico, Northern Marianas, and the Virgin Islands. In the category of CP the following were grouped: Iowa, New Hampshire, Rhode Island, South Dakota, Texas, American Samoa, and the Bureau of Indian Affairs. The remaining states were assorted in the Residual category. If the cut-off points had been broken down to shorter percentage intervals a few of the Residual category states would have been grouped in the HIIE, LIIE, or MIIE category, but most would have fallen in the CP category. Since state variability is adequately demonstrated with the presented scheme and since the main intention here is to make research suggestions based on a targetable number of states, the Residual category is regarded as appropriate.

Why is it that states depict such a wide variability in placement practices despite adherence to the same federal law? The Office of Special Education Programs has speculated that several factors may have been influential in such an outcome: "the historic role of private schools in the State, the role of separate facilities in the State, the State's special education funding

TABLE 14

**Inclusive Education for Disabled Students in
States According to Regular Class and
Combined Regular Class and Resource Room
Placements in 1988-89**

<u>Incidence of Inclusive Education</u>				
<u>High</u>	<u>Moderate</u>	<u>Low</u>	<u>Contradictory Practices</u>	<u>Residual</u>
Alaska	Mississippi	Alabama	Iowa	Arkansas
Idaho	Missouri	Arizona	N. Hampshire	Colorado
Maine	N. Carolina	California	Rhode Island	Connecticut
Montana	S. Carolina	Delaware	S. Dakota	Florida
Nebraska	Tennessee	D.C.	Texas	Hawaii
New Mexico	Washington	Georgia	A. Samoa	Indiana
North Dakota	West Virginia	Illinois	Bureau of	Kansas
Oregon	Wyoming	New York	Indian	Kentucky
Vermont		Puerto Rico	Affairs	Louisiana
		N. Marianas		Maryland
		Virgin Islands		Mass.
				Michigan
				Minnesota
				Nevada
				New Jersey
				Ohio
				Oklahoma
				Pennsylvania
				Utah
				Virginia
				Wisconsin
				Guam

formula, different State reporting practices and interpretations of the OSEP data collection forms, and actual differences in the populations and needs of students" (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1991, p. 29).

In this area, there is clearly a need for research to uncover the reasons for the widely varying state placement patterns. Of particular interest would be a three-branch study to examine practices in the states that have been grouped in the HIIE, LIIE, and CP categories. Investigation of the state practices in the HIIE category may reveal how and why these states have come to adopt the least restrictive placement patterns, what educational practices best correspond to successful LRE educational patterns, and how obstacles were or are being overcome. A pertinent research question would also be: 'How meaningful or substantial is this change in educational placement patterns from the past?'. Following the same rationale, inquiry of the state practices in the LIIE category may uncover how and why these states have come to utilize the more restrictive placements, what educational practices are detrimental to inclusive educational patterns, and how barriers have worked to thwart reform. The third part of the study, examination of state practices in the CP category, might expose how and why these states have come to employ both least and more restrictive placements, what educational practices (despite being adopted for LRE purposes) have had exclusionary consequences, and how traditional methods may act antithetically toward inclusive educational reform.

It is suggested that this proposed study incorporates both local and national social factors in its methodology so that research findings can be interpreted meaningfully both at the local and national levels. In the District of Columbia, for example, inner-city segregation of minority and disadvantaged groups poses a real challenge to the practice of inclusive education. Research

findings and attempts at reform will obviously have to take into consideration the local social context.

Inclusive Education Policy Issues

We can, whenever and wherever we choose, successfully teach all the children whose schooling is of interest to us. We already know more than we need in order to do this. Whether we do it or not must finally depend on how we feel about the fact that we haven't done it so far (Edmonds, 1978, p. 35).

What is generally coming out of the literature for and against mainstreaming is that the major issue is not the relative efficiency of integrated over segregated education. The perceived main question is whether American society feels, or should feel, bound to provide mainstreamed education.

Many individuals with disabilities have expressed frustration with their marginalization by schools and society in general. Ted Kennedy, Jr. (1986), who has been classified as disabled, declared his feelings in these words:

We are tired of being treated as dependents to be cared for through special and welfare programs (p. 4).

Our handicap is one caused by a society insensitive to the needs of others (p. 4).

Another student with disabilities, who had been segregated throughout her schooling, expressed the following view concerning her educational placement:

I graduated...completely unprepared for the real world. So I just stayed in the house all day...believing a job was out of the question....Believe me, a segregated environment just will not do (Massachusetts Advocacy Center, 1987, p. 4).

In the words of another disabled individual, education in a special class was neither a pleasant nor productive experience:

We were isolated. Symbolically - and appropriate to the prevailing attitudes - the "handicapped and retarded" classrooms were tucked in the corner of the school basement. Our only activity with the other children was the weekly school assembly. We never participated in any school program. We watched. Although the lunchroom was also in the basement, we ate lunch in our classrooms.

Summing it up, the only contact we had with the "normal" children was visual. We stared at each other. On those occasions, I can report my own feelings: embarrassment. Given the loud, clear message that was daily being delivered to them, I feel quite confident that I can also report their feelings: YECH! We, the children in the "handicapped" class, were internalizing the "yech" message - plus a couple of others. We were in school because children go to school, but we were outcasts, with no future and no expectation of one. I, for one, certainly never contemplated my future. I could not even picture one, much less dream about it (Massachusetts Advocacy Center, 1987, pp. 4-5).

Given these feelings by individuals with disabilities, it is not surprising that many view themselves as being a distinct social group. According to a Louis Harris and Associates (1986) survey, 74% of surveyed people with disabilities reported at least some sense of common identity with other persons with disabilities. Fifty six percent of disabled individuals of adolescent age or less and 53% of those of age 44 or younger reported the perception that they are a minority group similar to African-Americans and Hispanic-Americans (p. 113). In general, many disabled persons perceive disability as going beyond physical impairment to needless dependence on relatives and professionals and as relating to civil rights and accessibility issues (DeJong & Lifchez, 1983).

The minority group perspective of disability takes into consideration sociological, political, and cultural theories of deviance. As such, it differs significantly from viewpoints based on biology and psychology (Biklen, 1989; Skrtic, 1986) in that it views segregation as social discrimination. According to Hahn (1989) the implication is that the rights of people with disabilities should be collectively examined under the 'equal protection' clause of the Fourteenth Amendment of the U.S. Constitution because "citizens with disabilities have been subjected to

more rigid and pervasive segregation practices than those imposed under apartheid" (p. 231). This view acquires further credence given that the classification of students from minority and disadvantaged groups as disabled is disproportionately higher than students from higher socioeconomic status groups (Biklen, 1992, pp. 182-186; J. D. Finn & Resnick, 1984; Messick, 1984; Snow, 1984). In the 1970s the National Academy of sciences, responding to charges of racial discrimination in special education evaluations, commissioned several studies. One of the major conclusions was the following:

[W]e can find little empirical justification for categorical labeling that discriminates mildly retarded children from other children receiving compensatory education (Heller, Holtzman & Messick, 1982, p. 87)

The Executive Committee of the Council for Children with Behavioral Disorders (1989) has listed several major factors of misdiagnosis of culturally different students that apply to all the disability categories: linguistic and social differences, misperceptions and low expectations by teachers, and more likelihood of referral of students from culturally diverse populations.

An adjunct to the minority group perspective is the 'moral community' argument (e.g. Lipsky & Gartner, 1989b; Pearpoint, 1989; Shanker, 1988). Douglas Biklen (1985) has summarized it quite succinctly:

Some people would have us wait for science, in this case educational researchers, to prove that integration yields faster, more effective learning than does segregation. But [it does not make sense]...to look to science for an answer to the question, "Is it good and right for people to care for their aging parents?" In other words, the practice of integration...is not fundamentally a question that science can answer. From science, we can learn some of the effects of such a policy...or how to make it work better, but science cannot tell us that integration is right....We can answer it only by determining what we believe, what we consider important (pp. 183-184).

The minority group and moral community perspectives imply that the "principal change to be sought in education policy is the...integration of disabled students into regular classrooms" (Hahn, 1989, p. 233).

Inclusive education policy has to operate within a larger contextual framework that avoids considering disabilities in "compartmental terms" (p. 240). Matters such as authority in schools, participation of teachers in their community, educational objectives, and equity and 'excellence' have to be addressed (Biklen, 1989). The concepts of 'quality' and 'excellence' in education that have come to the forefront of educational debate during the 1980s and 1990s are of particular relevance to inclusive schooling and special education.

Educational 'Quality and Excellence' and Special Education

Several reports during the 1980s (e.g. Boyer, 1983; National Commission on Excellence in Education, 1983;Sizer, 1984) criticized American public schools as having pervasive problems in serving regular education students and concluded that there is a need for 'excellence' in education. As a consequence, higher educational standards and promotion of 'winners', with many elitist concepts attached to them, became slogans in many schools.

It was argued in the 1980s that these developments would widen the gap between regular and special education (Sapon-Shevin, 1987; Shepard, 1987) or even lead to more referrals to special education (Hocutt, Cox, & Pelost, 1984; Shepard, 1987). In a report prepared by directors of special education in large U.S. cities in 1986, it was stated that the pressure for 'excellence' in schools had sparked the transfer of underachieving students to special education programs where their standardized scores are often not included in overall district totals (Council of Great

City Schools, 1986). In a 1988 report on a study documenting increases in special education enrollments, it was once more asserted that "[h]igher standards in the name of educational reform seem to be exaggerating the tendency to refer difficult children to special education" (Viadero, 1988, p. 17). More recently, according to Lipsky and Gartner (1989b), there has been increasing attention to disadvantaged students. The meaning of this attention is discussed in the following chapters.

Some special education researchers, in response to the 'excellence' movement, have argued that students with disabilities should not be educated in the mainstream of regular education because regular education has already failed regular students (e.g. Kersh, 1988). Others have claimed that 'excellence' and integrated education are contradictory in practice:

Our suspicion is that the press for more effective schools is fundamentally incompatible with the press for greater teacher acceptance of variability in students' behavior and performance. One may, in practice, have to choose between improved mean performance and heterogeneous grouping of students for instruction (Kauffman, Gerber, & Semmel, 1988, p. 9).

On the other side, advocates of mainstreaming have argued that "quality education can only occur in integrated, ordinary schools" (Flynn & Kowalczyk-McPhee, 1989, p. 31) and that the "movement toward inclusive education is a process - a journey to create an educational system where excellence and equity walk hand in hand and where the highest values of the nation are respected, honored, and achieved" (Forest & Pearpoint, 1990, p. 187). This 'journey' presupposes the development of 'caring' communities (Falvey, Coots, & Bishop, 1990), schools (Sapon-Shevin, 1990a), and teachers (Biklen, 1989).

At the heart of the issue between the two opposing reform movements are differing, really conflicting, definitions of and assumptions about 'quality' and 'excellence' in education. The

reform movement advocating higher academic standards and results tends to define 'quality' and 'excellence' in terms of competition, promotion of the 'best' students, and concentration in the areas of science, mathematics, and technology. The mainstreaming reform movement, on the other hand, tends to define 'quality' and 'excellence' in terms of cooperation, respect for and valuation of individual differences and academic subject preferences, and achievement of all students' potential irrespective of talent or disability. The former movement is discussed in detail in the following chapter.

Obstacles to Mainstreaming and Inclusive Education

The problems that students with disabilities encounter in schools are indeed substantial. Resistance to integrated education is strong and there are indications of a counter-movement to reestablish the prevalence of segregated schools (Stainback, Stainback, & Bunch, 1989b). There are several barriers to inclusive schooling: funding patterns (Lipsky & Gartner, 1989e), the structural dichotomy of regular and special education (Wang, Reynolds, & Walberg, 1988), existing classification schemes (Hobbs, 1980), school organization and routines (Slavin, 1987; Stainback, Stainback, Courtage, & Jaben, 1985; Villa & Thousand, 1990), teacher resistance (Gerber & Semmel, 1984) and teacher preparation programs (Pugach, 1988), court decisions regarding parental and professional authority (Biklen, 1992, pp. 95-99), and lack of adequate support for teachers and disabled students in the mainstream (Stainback & Stainback, 1990a).

Funding, in general, is a powerful incentive to establish or maintain certain activities. Allocation of fiscal resources for separate class placement discourages the implementation and expansion of alternative programs to keep students in the regular classroom (L. J. Walker, 1987).

It has been strongly articulated that even though many state departments of education and federal agencies profess to subscribe to integration philosophy, segregation is encouraged by providing a lopsided amount of money for classification and 'pull out' programs rather than for programs attempting to educate students in regular classrooms (Lipsky & Gartner, 1989e). This was the case throughout the 1980s when, according to Lipsky and Gartner (1989c), "the funding patterns of special education promoted growth and internal segregation" (p. 10). The differential placement patterns among states (see **Tables 13 & 14**) may be explained to some extent by differential funding patterns (Biklen, 1992, pp. 99-103; Noel & Fuller, 1985).

Epps and Tindal (1987) have described financial support to special education very graphically:

...the yoking of funding to child counts establishes a bounty system that generates an active search for students with mildly handicapping conditions and creates conditions antithetical to the establishment of proactive and successful programs (p. 242).

Lipsky and Gartner (1989e) have cited two examples that occurred during the 1980s where classification, placement, and funding were issues of concern for the state education departments of Washington and New York. In the Olympia, Washington project of Maximizing Educational Remediation within General Education there was so much success in keeping students, otherwise eligible for special education, in regular classes that funding for the project almost ceased. These students had to be classified as disabled so that the state education department would continue to fund the project. In a similar case in New York state, however, the education department declined funding for an Adaptive Learning Environments Model project on the grounds that the students could not be disabled if they were fully educated in the mainstream.

These examples are an indication of the impact of the dichotomy between regular and special education. In special education, students with disabilities are viewed as impaired, instruction focuses narrowly on disabilities, and personnel are only trained and certified on specific disabilities (Lipsky & Gartner, 1989b). Special education programs have the capability to sabotage effectively any alternative avenues to solve problems within regular education (Sarason & Doris, 1979) because the duality of the educational system "can serve to legitimize exclusion of some students from regular education, reduce opportunity for equal participation by other students, and sanction other forms of discrimination" (Stainback, Stainback, & Bunch, 1989a, p. 25).

Current identification and classification schemes of disability play a major role in reinforcing the division between regular and special education. They are based on norm-referenced and logical-mathematical conceptions of intelligence and ability (e.g. Kauffman, Gerber, & Semmel, 1988) posing a substantial hindrance to a meaningful and effective delivery of service to students and their families (Hobbs, 1980). According to Deno (1978) categorization and classification are

deeply entrenched in the social commitments of categorically defined special-interest advocacy groups; in the structure of health, education, and welfare programs at direct service levels; in the staffing of teacher training institutions; in other professional training programs; and in general public thinking (p. 39).

Definitions of disability based on defect concepts are not easy to dispel because they are based on "stereotyping, prejudice,...discrimination" (Biklen 1989, p. 236), and misunderstanding. It is not surprising, then, that many special and regular educators, legal specialists, and even parents of students with disabilities insist on the continuation of identification and classification practices (Gearheart, Weishahn, & Gearheart, 1992, pp. 46-47; H. Turnbull, 1986, p. 72).

Apart from classification issues, school organization is in itself a major obstacle to inclusive education. Schools are currently organized in a rigid manner along grade levels, noncollaborative teaching patterns (Thousand & Villa, 1989; Villa & Thousand, 1990), schedules that discourage teachers from peer dialogue and communication (Goodlad, 1984; Lortie, 1975), and homogeneous grouping arrangements (Slavin, 1987). In light of all these school organizational realities there are considerable constraints which oppose, if not undermine, mainstreaming because

current school organization creates - and can do nothing but create - students with mild disabilities as artifacts of the system and...efforts to reform the system - without replacing it with an entirely different configuration - do little to eliminate mild disabilities or their effects, produce even more students with mild disabilities, and create a new and largely hidden class of student casualties (Skrtic, 1987, p. 3).

Since accomplishment of the objectives of an institution is closely related to its organization (Brookover, Beamer, Efthim, Hathaway, Lezzotte, Miller, Passalacqua, & Tornatzky, 1982, p. 78), it can prudently be said that exclusion of students with disabilities is not just a consequence of schooling - it is one of the implicit, or hidden, objectives of American public education.

Teacher resistance to inclusion of students with disabilities in the mainstream of education is intimately linked to the existing organizational patterns in schools. On the one hand, many teachers perceive that additional effort will be required on top of their overloaded schedule and view increased pay and reduced class sizes as a legitimate request (Pyecha, Kuligowski, & Wiegierink, 1984). On the other hand, they have been conditioned to regard students either as 'normal' or 'special' (Sarason, 1982), view homogeneous grouping as more or less the only viable course (Gerber & Semmel, 1984), and accept the 'deal' between regular and special education that students with problems are the responsibility of special educators (Chalfant, 1987).

The "white coat" (Flynn & Kowalczyk-McPhee, 1989, p. 30) image of special educators has contributed significantly to regular educators' willingness to accept tacitly the relinquishing of ownership of special students.

The lack of time for professional communication, peer collaboration, and team teaching in schools provides another source of misunderstanding among many teachers about integration. They come to perceive that mainstreaming does not or cannot work when it is the school structure and organization that have failed to accommodate the practices of inclusive education (Karagiannis & Cartwright, 1990). In other words systemic inadequacies are misinterpreted as failure of mainstreaming philosophy and practice, and the result in many cases is reinforced teacher resistance (Kauffman, Gerber, & Semmel, 1988).

Most teacher education programs make a significant contribution to this misapprehension by preparing student teachers to embrace uncritically the 'deal' between special and regular education (Aksamit & Alcorn, 1988; Egbert & Kluender, 1979; Hoover, 1987; Pugach, 1988; Roberson, 1980; Sattler & Graham, 1983) which is officially sanctioned by state agencies in the form of certification regulations (Stainback & Stainback, 1989a). In their current form and content, most teacher education programs act to undermine mainstreaming and inclusive education. Since it is teachers in schools who are directly going to implement or reject integration, the extent of teacher resistance in schools and preparation programs cannot and should not be underestimated.

The rise of professionalism in special education and the movement to integrate students with disabilities in the regular classroom have developed side by side. To a certain extent the latter has made use of the jargon and methods of the former to promote its objectives. Despite

this convergence, professionalism in special education has been criticized for amplifying professional authority over parents and their children:

While educational policy has often included a role for parent participation and monitoring, policy concepts such as "least restrictive environment," "individualized educational program," "continuum of services," and "multidisciplinary assessment" may actually further professional authority over the school lives of students who are designated "disabled" (Biklen, 1992, p. ix).

Research clearly indicates that parental participation in educational decision making has been very low (Goldstein, Strickland, Turnbull, & Curry, 1980; Lynch & Stein, 1982; Morgan, 1982).

Along these lines, court decisions have classified parental authority as subordinate to professional authority with regard to educational placement. Not only have they placed parental authority lower than professional expertise, they have also created a complex legalistic network that in many cases takes precedence over common sense (Biklen, 1992, pp. 95-99, 181-182). Under professional authority even the parents are sometimes treated as disabled or unable to decide soundly the educational future of their children (Sarason & Doris, 1979; Turnbull & Turnbull, 1985).

Finally, there is the problem of lack of support for teachers and students with disabilities in the mainstream. Support can take many forms such as special education services provided in the regular classroom and resource rooms, teaching assistants, professional peer collaboration (Stainback & Stainback, 1990a), student peer interaction and friendships (Gottlieb & Leyser, 1981; Strully & Strully, 1985; Vandercook, Fleetham, Sinclair, & Tetlie, 1988; York & Vandercook, 1988b), and easy access to school facilities.

Vested Interests

Thirteen years ago, Hilliard (1979) made the following prediction:

We will continue to see the attempt by teacher educators to accommodate past professional practice to the newly desegregated environment, rather than reconstructing professional concepts and practices in any basic way. This will be due both to the natural function of the vested interests among us as well as to the absence of time and resources to do the bigger job of reconstruction (p. 12).

In 1992, this prediction could not be more accurate. Vested interests indeed have a powerful backing by inertia and tradition. Educators, in general, were initially not allied with the mainstreaming movement (Hudson, Graham, & Warner, 1979; Meyen, 1979) and, even though this may be changing, there is still considerably more opposition than support. Special and regular educators, researchers, and administrative personnel have interests that run against the philosophy and practice of integration.

Perhaps the most vehement opposition to mainstreaming comes from learning disability specialists whose established interests are likely to be affected more than any other participant group in education. This is so because they "have built their careers and reputations on the identification, diagnosis, and treatment of learning-disabled children" (Christensen, Gerber, & Everhart, 1986, p. 327) and because students classified in the learning disability category comprise the single largest group served in special education. The concept and definition of learning disability has been criticized as being inconsistent, lacking substantial empirical support, and - to a large extent - being the artificial product of schooling processes (Ysseldyke, 1987; Ysseldyke, Thurlow, Christenson, & Weiss, 1987). These controversial issues have not been addressed in any significant manner by learning disability researchers and practitioners (e.g. Bryan, Bay, & Donahue, 1988; National Joint Committee on Learning Disabilities, 1988).

When the REI was proposed (Will, 1986), a whole issue of the *Journal of Learning Disabilities* (21(1), 1988) was devoted to it. The underlying theme was a general resistance to the initiative:

Finding it perplexing that many were rushing to embrace the REI position but few were analyzing or even questioning its merits, we decided to write an article examining the various facets of the REI. The more we discussed this task, the more we realized the complexity of the issues....[and] the more we mentioned what we were doing to colleagues around the country, the more we found that they, too, were concerned about the seemingly tacit acceptance of the REI by the special education community (Hallahan, Kauffman, Lloyd, & McKinney, 1988, p. 4).

The idea that special education specialists' role be redefined to a supportive one to regular teachers is perceived by many special educators as inferior, although it need not be, and thus as unacceptable:

While we value the work of paraprofessionals, we do not believe that a special education teacher with advanced training and certification is likely to appreciate being placed in a supportive position on the same level with someone who does not have equal training or credentials (McKinney & Hocutt, 1988, p. 17).

The notion behind this statement is that special educators are better equipped than regular educators. It has been explicitly maintained that regular teachers can do little to educate students classified as learning disabled (Bryan, Bay, & Donahue, 1988) - an argument that is being offered as one of the major justifications for resisting the REI in particular (Braaten, Kauffman, Braaten, Polsgrove, & Nelson, 1988; Hallahan, Keller, McKinney, Lloyd, & Bryan, 1988; Kauffman, Gerber, & Semmel, 1988) and integration in general. Other major objections can be summarized as 'lack of evidence' supporting the REI or 'need for more research' (Hallahan, Keller, McKinney, Lloyd, & Bryan, 1988; Keogh, 1988; Lloyd, Crowley, Kohler, & Strain, 1988; McKinney, & Hocutt, 1988), financial infeasibility, and conflict of teaching objectives between

heterogeneous student groups and improved mean performance (Kauffman, Gerber, & Semmel, 1988).

In the same realm, regular education teachers perceive that mainstreaming and inclusive education practices impinge upon their own interests. Since the 'deal' between regular and special education personnel separates the two branches into autonomous units, the former do not appear enthusiastic about the prospect of additional responsibility and ownership of students for whom they had been absolved in the past (Christensen, Gerber, & Everhart, 1986).

Professionals and academics in teacher preparation programs also have their own interests at stake. Acquired knowledge, in general, can be used for two purposes: transmission or practice. Teacher trainers transfer their knowledge to student teachers with the expectation that the latter, when certified as teachers, will put this knowledge to practice in schools. Job titles, formal job descriptions, informal roles (Brookover, Beamer, Efthim, Hathaway, Lezzotte, Miller, Passalacqua, & Tornatzky, 1982), and knowledge acquired in schools of education determine to a large extent the way education personnel behave in school. Academics naturally desire to teach their students what they know to fulfil their own intellectual needs, to accomplish what they perceive as important, and to ensure the continuation and survival of their academic discipline. Since the prevailing educational framework of most teacher education programs is based on a model of segregation, many education academics will resist an extensive restructuring to reflect mainstreaming education philosophy because they perceive it as a threat to their own compartmentalized specialties.

Another group whose interests may be affected is district, board, and school administrators. One of their mandates is to maintain and attract funding for the operation of the

schools under their authority. The examples of mainstreaming projects in Washington and New York states cited above, where there were funding complications, are an indication of the objection many administrators may have to the initiation or expansion of similar projects. Put simply, few administrators desire loss of funding in their turf. Current funding patterns in many states make almost inevitable the necessity for labeling of students and the use of 'tag' special education programs. Kauffman, Gerber, and Semmel (1988) have expressed it very clearly:

The necessity for this identification is as obvious to us as the necessity for budget lines for "national defense" and "education" (p. 10).

Mainstreaming Practices

The elements that appear most often in literature as crucial for mainstreaming in schools are: peer, teacher, and administrator attitudes toward students with disabilities and their integration into the regular classroom; appropriate service delivery models; and the underlying school philosophy. These three elements are interdependent and may influence each other positively or negatively.

Peer, teacher, and administrator attitudes have been indicated as having a decisive effect on the success of mainstreaming programs. Peer rejection or isolation of students with mental disabilities (Bruininks, 1978; Goodman, Gottlieb, & Harrison, 1972; Gottlieb & Budoff, 1973; Gottlieb & Switzky, 1982; Gresham, 1984; Iano, Ayers, Heller, McGettigan, & Walker, 1974; Reese-Dukes & Stokes, 1978; Sandberg, 1982), learning disabilities (Bryan, 1978; Bruininks, 1978; J. W. Chapman, 1988; Gresham, 1984; Pearl, Bryan, & Donahue, 1983; Pearl & Cosden, 1982), physical disabilities (T. L. Thompson, 1982), deaf and hearing impairments (Antia, 1985),

and emotional disturbance (Gaylord-Ross & Haring, 1987; Nelson, 1988) have been well documented in literature as having an aversive impact on their academic and social integration. Negative teacher attitudes (Aloia & MacMillan, 1983; Feldman & Altman, 1985; Guerin & Szatlockey, 1974; Ringlaben & Price, 1981) can have a harmful effect on teacher expectations and practices (Alexander & Strain, 1978; Madden & Slavin, 1983). Positive attitudes by principals considerably enhance the chances of success of mainstreaming programs (W. E. Davis, 1980; Payne & Murray, 1974). It has been suggested that existing negative attitudes may change by providing more accurate information on individuals with disabilities (Gearheart, Weishahn, & Gearheart, 1992, pp. 127, 132-134; Johnson & Johnson, 1984; Stainback & Stainback, 1982), by conducting classroom discussions on students' values and beliefs (Gearheart, Weishahn, & Gearheart, 1992, p. 127), and by making cooperative learning arrangements (Gearheart, Weishahn, & Gearheart, 1992, p. 127; Johnson & Johnson, 1984; Stainback & Stainback, 1982). In general, peer, teacher, and administrator attitudes influence each other within the context of the school.

It has been supported that the overall delivery model of services may positively influence attitudes and may determine the success of mainstreaming programs. Coordination between regular and special education efforts, which may include student scheduling for the various academic subjects, teacher scheduling, and an effective communication mechanism for all participants, is thought to be crucial (Schulz, Carpenter, & Turnbull, 1991, pp. 190-192). The adequacy of this coordination may be a decisive factor in enhancing positive or negative attitudes toward mainstreaming (Karagiannis & Cartwright, 1990) because an integrated placement with

little or no educational intervention is judged to be far from sufficient (Ballard, Corman, Gottlieb, & Kaufman, 1977; Gottlieb, Cohen, & Goldstein, 1974; Mosley, 1978).

Three 'mainstreaming' models have been identified reflecting divergent philosophies of education. In the first type, which has been termed 'teacher deals', teachers accept disabled students in their classroom with modest or little support and practice mainstreaming by trial and error. It may or may not work depending on the limits of the teachers and the students (Biklen, 1992, pp. 144-148) and the particularities of the school site (Karagiannis & Cartwright, 1990). The second variant, which has been called 'island in the mainstream', involves mainly separate special classes in regular schools where there is some limited interaction among disabled and nondisabled students. For all practical purposes, it is a dual system where regular and special education function as parallel systems communicating poorly with each other (Biklen, 1992, pp. 144-148).

Only the third type, which has been renamed 'purposeful integration' from 'unconditional integration' (Biklen, 1985), is perceived as attempting academic and social integration of all students in a programmatic manner. All students participate in all school activities and there is administrative and teacher cooperation. Team teaching, cooperative instruction, teacher assisting, experiential learning, and other collaborative approaches are used. Unlike the first two types, 'purposeful integration' has as its objective to change the structural and organizational operation of schools to reflect the philosophy that integration is always preferable to segregation (Biklen, 1992, pp. 144-148).

The Merger Option

In the mid-1980s, advocates of mainstreaming became dissatisfied with the 'teacher deals' and 'island in the mainstream' models. They perceived them as being driven by the existing structure and philosophy of American education:

Dichotomizing students into two basic types (special and regular), maintaining a dual system of education, separate professional organizations, separate personnel preparation programs, and separate funding patterns does very little to foster the values inherent in the mainstreaming and integration movement of the past decade. In essence, during the past decade we have been attempting to integrate students while separating them into two kinds of learners and without integrating programs, personnel and resources (Stainback & Stainback, 1984, p. 10).

Obstacles such as the dichotomy of regular and special education, classification, funding, service delivery models (Stainback, Stainback, & Bunch, 1989a), professional identity and vested interests (Lilly, 1989), existing attitudes among educators, state certification regulations, and teacher preparation programs (Stainback & Stainback, 1989a) were repeatedly cited as reasons for revamping the educational system to reflect mainstreaming policies and practices. Consequently, the merger of regular and special education at all levels was proposed as an appropriate model of purposeful integration (Stainback & Stainback, 1984, 1989a). It was pointed out that special education personnel would not be regarded as obsolete in a unified system. Rather, they would hold an important role, albeit within the regular education realm (Stainback & Stainback, 1990a, 1990b). Since the late 1980s an increasing number of educators and parents has been advocating the merger alternative (e.g. Gartner & Lipsky, 1987; Lilly, 1988; Strully, 1986; Wang & Walberg, 1988).

Despite increasing acceptance of the idea of merging regular and special education, there has also been strong opposition on the basis that a wide range of special education services is needed (Gearheart, Weishahn, & Gearheart, 1992) and that special and regular educators have very different views of educational theory and practice (Lieberman, 1985; Messinger, 1985). Based on the findings of the effective schools research, however, it has been argued that the merger option is the best system to educate students with disabilities because the same principles of effective education have been found to apply in both special and regular education (Bickel & Bickel, 1986; Goodman, 1985; Jewell, 1985; Larrivee, 1986; Peterson, Albert, Foxworth, Cox, & Tilley, 1985). Parenthetically, the five key characteristics of effective schools are: educational leadership, orderly school environment, high achievement expectations for all students, systematic monitoring of student performance, and emphasis on basic skills (Edmonds, 1979, 1982). Advocates of the merger option have taken the argument a step further by asserting that effective and quality education can best be attained for all children, not just students with disabilities, within a merged system (Gartner & Lipsky, 1987; Stainback, Stainback, & Bunch, 1989a; York & Vandercook, 1988a).

Change in teacher preparation programs and schools of education has been described as a necessary link in the reform efforts to accommodate mainstreaming (Aksarmit & Alcorn, 1988; Egbert & Kluender, 1979; Hoover, 1987; Roberson, 1980; Sattler & Graham, 1983). Similar to the unification of regular and special education in schools, it has been proposed that teacher training institutions can integrate personnel, programs, and resources in regular and special education departments. Lilly (1989) has asserted that schools of education will have to adapt to the realities of heterogeneous school practices and that it is possible to design ideal programs

within a period of ten years. This could be achieved by strengthening existing ties between departments in teaching and research, restructuring organizational units, reshaping course content, avoiding the use of categorical labels, and cooperating with government agencies to modify teacher certification requirements and funding patterns (Stainback & Stainback, 1989a).

So far there have been a few isolated but no comprehensive attempts to unify special and regular education (Stainback & Stainback, 1989a). It has been implied that progress in mainstreaming is significant and irreversible and that the merger is inevitable (Hagerty & Abramson, 1987; Lilly, 1989; Pugach & Lilly, 1984; Stainback & Stainback, 1989b). Whether this will be the case, in terms of genuine 'purposeful' mainstreaming, remains to be seen.

Philosophy

The merger option has adopted an inclusive philosophy of schooling:

An inclusive school is one that educates all students in the mainstream....[by] providing...appropriate educational programs that are challenging yet geared to their capabilities and needs as well as any support and assistance they and/or their teachers may need (Stainback & Stainback, 1990b, p. 3).

Several concepts such as 'acceptance' (Bogdan & Taylor, 1987), 'complete schooling' (Biklen, 1985), 'circles of friends' (Perske, 1988), and 'community integration' (S. J. Taylor, Biklen, & Knoll, 1987) have been used in conjunction to the concept of inclusive schooling.

Douglas Biklen (1992), in *Schooling Without Labels*, examined the beliefs and practices of six families that fully included their disabled children in all aspects of their lives. In his comparison with schools, he found educational beliefs and practices to differ significantly from those held by the families. He concluded that it is not so much knowledge but commitment and a philosophy of acceptance that shape inclusive practices:

None of the changes needed to achieve integration is rooted in technique - for example, in getting a better diagnosis or even in finding a better method of education....Rather these changes originate in a vision and a knowledge of people with disabilities as the equals of other people (p. 188).

Based on the experience with these six families, Biklen (1992) proposed a general framework of inclusive schooling based on the following: all people, not just professionals, have the potential capability to raise and educate children with disabilities; labels are unnecessary; inclusion in schools should be unconditional; schools should accept diversity; emphasis should be put on identifying individual abilities and talents; disabled students should be ascribed equal status with students without disabilities; constant, full inclusion should be provided by creating appropriate conditions and opportunities; adequate resources should be readily available; and sharing of experiences among parents with disabled children is crucial (pp. 14-19).

This general framework is depicted in what he sees as the three components of inclusive schooling: (1) commitment incorporating democratic philosophy and values, a sense of community and collaboration among all participants, and educational leadership; (2) organizational framework including a single administrative structure responsible for program development for all students, school policies applying to all students, and teacher and specialist integration through collaboration; and (3) elements of schooling embracing heterogeneous grouping, constant full inclusion, experiential learning, teachers as models of social skills and educational strategies, systemic school feedback providing rewards and program evaluation, nonpatronizing accommodations and leadership opportunities for disabled students, flexible teacher supervision allowing for high expectations and student independence, interdependence and spontaneous interaction, valuation of respect and friendship among students, use of nonjargonized

language by school professionals, and participation through active encouragement (Biklen, 1992: pp. 176-178).

Three interdependent components have been described as promoting the merger: support networks (Stainback & Stainback, 1990ab; Stainback, Stainback, & Harris, 1989), collaborative consultation or teaming (Donaldson & Christiansen, 1990), and cooperative learning (Sapon-Shevin, 1990b). Support networking through task forces and teams (Fuchs & Fuchs, 1988; Haydek, 1987; Idol, Paolucci-Whitcomb, & Nevin, 1986) represents the structural component. Collaborative consultation among professionals is the general process model of support networks. Cooperative learning such as peer tutoring, volunteering, buddy systems or friendship circles (Falvey, 1989; Grenot-Scheyer, Coots & Falvey, 1989; Perske & Perske, 1988; Vandercook & York, 1988) exemplifies the specific strategies that may be used with students. All these components are discussed below.

Support Networks

The concept of 'support networking' is thought to be critical in achieving successful integrated schooling. It involves a coordinated network of teams and individuals who support each other by formal and informal connections (Stainback & Stainback, 1990b). The operational considerations of support networking, according to Stainback and Stainback (1990a), should be based on the needs of all students and teachers, on empowering disabled students, on programmatic efforts, on administration by insiders, and on positive and natural social interactions in schools.

In this network the 'facilitator' occupies a leading role in coordinating, organizing, and promoting support networking. The facilitator role involves the issues of identification of formal and informal supports for all school participants who need them, collaboration with students and teachers in deciding on the most desired supports, and implementation of these supports. The most likely candidates to become facilitators, according to Stainback and Stainback (1990a), are special educators.

The facilitator position requires a variety of interpersonal and professional skills. At an interpersonal level, the facilitator has to be able to involve all participants in a collaborative manner to achieve ownership, satisfaction, and effective results by promoting communication among different parties. At a professional level, the facilitator should have a good working knowledge of the available support models and resources and the ability to assess and pair effectively the needs of students and teachers with available support options (Stainback & Stainback, 1990a). Some of the responsibilities of a facilitator of supporting networks have been identified by Stainback and Stainback (1990d): establishment of integration task forces, search for additional supports and resources, establishment of student peer support groups in each classroom (membership rotates frequently), organization of student and teacher assistance teams, participation of facilitator as team teacher in own area of expertise, performance of curriculum and task analysis, location of needed specialists, operation as home-school liaison, assistance in changing traditional special education terminology and processes, and aid in using new technology.

The role of principals and administrators is also prominent in the support networking framework. The central position of principals in mainstreaming reforms has long been recognized

(Klopf, 1979). Their primary responsibilities are portrayed as promoting an inclusive schooling philosophy, building consensus in the school community, and fostering the unification of regular and special education services. Advancement of inclusive philosophy and creation of consensus involves a collection of strategies. First, inservice training and development, which may take several years, can include workshops, visits to inclusive schools and communities, or dissemination of information through readings and discussions. Second, establishment of committees which are responsible for clarifying inclusive mission statements and which may include various community and school members (some of them familiar with inclusive schooling) to ensure ownership. Third, incentives may be given to participants in the form of personal attention, public recognition of positive efforts, and other rewards (Villa & Thousand, 1990).

In the next step, furthering the fusion of regular and special education services, it is related how principals and administrators can use any of the following strategies. They can examine the existing curriculum to eliminate duplicate courses and effort, distribute joint responsibility to regular and special educators for overlapping course content, and publicize the fact that similar skills are required for good teaching in both regular and special education. A concurrent strategy would be to redefine staff roles by changing job titles, and formal and informal responsibilities and expectations. A gradual approach is recommended by establishing a pilot project site with willing and appropriately trained school personnel who will ensure success. Consequently, the pilot model can be diffused to other school sites. At this point administrators and principals are explicitly in the shoes of public relations experts and have to allow for flexibility and well timed interventions. Hiring staff who are positively inclined toward mainstreaming and providing opportunities for collaborative efforts by modifying the

organizational structure of the school - with particular attention given to scheduling - are two obvious mediations (Villa & Thousand, 1990).

Collaborative Consultation and Teaming

Collaboration is the general process model of networking. Professional collaboration is being used with increasing frequency in special and regular education (Donaldson & Christiansen, 1990). Several terms are being used to describe similar underlying school processes: 'collaborative consultation' (Donaldson & Christiansen, 1990; Harris, 1990), 'professional peer collaboration' (Pugach & Johnson, 1990), and 'collaborative teaming' (Thousand & Villa, 1989) or 'team teaching' (Thousand & Villa, 1990). All the above terms are used interchangeably here.

Harris (1990) has defined collaborative consultation "as a process that will enable individuals with differing areas of expertise to work together to plan and conduct educational programs for diverse students who are learning together in mainstream settings" (p. 140). In principle, professional collaboration involves students, parents, regular and special educators, psychologists, administrators, and other specialists (Donaldson & Christiansen, 1990; Idol, Paolucci-Whitcomb, & Nevin, 1986; Phillips & McCullough, 1990).

The roles of the various collaborative members vary. It is implied that the presence of students with disabilities has the intention of sensitizing the other participants to their needs expressed verbally or indirectly. Other student peers may also offer valuable feedback in this respect while providing social and academic support and friendship. Parents have the ability to identify educational and social priorities for their children and participate in their implementation. Classroom teachers see their students in an inclusive framework and work closely with all other

participants. Their role is considered as very important. Support personnel can help to adapt curriculum, materials, equipment, and instruction in consultation with classroom teachers and provide any other needed services. The principal is primarily responsible for setting the general school environment through educational leadership, efficient management, conflict resolution, and support of any kind to all participants. Collaborative teamwork is viewed as essential in the development and implementation of IEPs. It is a process that adheres to the philosophy of inclusive schooling, values all members' contributions, approaches issues through cooperation and problem solving, and gives a sense of empowerment (Vandercook & York, 1990).

The generic skills needed for collaborative consultation have been identified by Harris (1990) as: technical expertise provided by team members in their own specialty; effective communication such as acceptance, positive rapport, feedback, and cooperative problem solving; and coordination among participants to provide services such as assessment, program content, implementation and evaluation (both formative and summative). These skills are used throughout the four steps of professional peer collaboration which are problem clarification, problem summarization, intervention and outcome prediction, and evaluation of outcomes (Pugach & Johnson, 1990).

It has been advised that professional peer collaboration need not be confined to individual students. It can and should be implemented school wide to deal with problems pertaining to small group management, instructional difficulties with whole classes, staff development, curricular matters, school wide management issues, resource utilization and identification, or scheduling coordination. It provides a forum of collegial dialogue for identifying problematic areas of teaching practice and school management and for finding novel and creative solutions. One of

the assumptions is that teachers have a substantial core of expertise that can be accessed through metacognitive, strategic thinking in the context of open and flexible communication (Pugach & Johnson, 1990).

Teaching teams, another type of professional collaboration, have been described as

organizational and instructional arrangement[s] of two or more members of the school and greater community who distribute among themselves planning, instructional, and evaluation responsibilities for the same students in a regular basis for an extended period of time (Thousand & Villa, 1990, pp. 152-153).

They usually have up to six or seven members drawing on various possible combinations from classroom teachers, special educators and other specialists, teacher assistants, student teachers, peer tutors, or community volunteers. The critical elements of effective teaching teams are thought to be continual personal interaction, close interdependence, small group social skills (leadership, communication, trust development, decision making, conflict resolution), periodic evaluations of group effectiveness and improvement, and individual responsibility for personal duties (Thousand & Villa, 1990).

Thousand and Villa (1990) have compiled a list of four areas on the rationale of forming teaching teams. First, there is a beneficial increase in teacher survival and a feeling of empowerment. Critical resources of special education are redirected to regular education so that both teachers and students benefit, decreasing the number of students in 'pull out' programs. Teachers grow professionally and personally by developing leadership, communication, conflict resolution, and alternative perspective-taking skills, and by increased self-esteem. Second, they acquire a degree of freedom by flexibility in scheduling and grouping, access to other members' expertise, and sharing of responsibility of students. Third, they secure a sense of belonging by increased social and professional support, commitment to and from other team members, and

positive interpersonal relationships. Support services personnel especially benefit because they are integrated with the rest of the school community. Fourth, they gain a sense of enjoyment by social and professional stimulation, creative and positive learning environment, and improved morale.

In professional peer collaboration research including sites in Alabama, Illinois and Wisconsin, cited in Pugach and Johnson (1990), several advantages were reported: a focus on teacher strategies rather than student deficits and an increase of teachers' tolerance toward students with cognitive disabilities; successful resolution of more than 85% of the identified problems; substantial decrease in referrals to special education; significantly increased level of teacher confidence in dealing with problems in the classroom; and elevated positive teacher attitudes toward their class. In general, there is considerable evidence to suggest that collaborative consultation is effective in keeping students in the regular classroom (Idol, Paolucci-Whitcomb, & Nevin, 1986; Knight, Meyers, Paolucci-Whitcomb, Hasazi, & Nevin, 1981; Lew, Mesch, & Lates, 1982; Miller & Sabatino, 1978) and in empowering teachers and students to take part in the decision making process (Johnson & Johnson, 1987; Slavin, 1987; Thousand, Fox, Reid, Godek, & Williams, 1986). It has been noted, nevertheless, that collaborative consultation will be successful only if all participating parties accept the ethic of multidisciplinary cooperation (Phillips & McCullough, 1990).

Cooperative Learning

Cooperative learning as a concept and practice has gained considerable popularity in the field of education the last few years. It has been espoused by advocates of mainstreaming as the

most appropriate general teaching methodology that can foster in practice the philosophy of inclusive education. In contrast to competitive learning, it can provide a classroom atmosphere in which students of varying ability and interests may mutually accept each other, form friendships, and achieve to their potential (Sapon-Shevin, 1990b; Schulz, Carpenter, & Turnbull, 1991, p. 184).

Heterogeneous grouping is seen as one of the cornerstones of cooperative learning. In a review of research on ability grouping, Slavin (1987) came to the conclusion that heterogeneous grouping should be maximized in schools while homogeneous grouping should be used flexibly in a few areas of specific instructional needs and for a limited period of time. There is firm research evidence that cooperative learning methods have positive effects on interethnic and reciprocal relations among students (Slavin, 1980) and on social acceptance of students with disabilities by their nondisabled peers (Evans, 1984).

Cooperative learning can be implemented to enhance classroom environment, form learning groups, and structure instructional and recreational games (Sapon-Shevin, 1990b). Some cooperative learning approaches are the McGill Action Planning System (MAPS) (Forest & Lusthaus, 1990), 'Circle of Friends' (Forest & Lusthaus, 1989), rap sessions and buddy systems (Gearheart, Weishahn, & Gearheart, 1992, pp. 131-132), cooperative goal structuring (Johnson & Johnson, 1986), small group teaching (Sharon & Sharon, 1976), the jigsaw method (Aronson, 1978), and team-games tournaments (DeVries & Slavin, 1978). They are described below.

MAPS, developed at McGill University, has been used to facilitate the integration of students with severe disabilities who previously had been placed in segregated settings. Although it has been primarily employed at the secondary level it can be used at any level with

adaptations. Initially an integration consultant visits the class where the student is going to be integrated and discusses with students their perceptions of persons with disabilities. At this stage a potential circle of friends is set up (arrangements for flexible membership and rotation can be made later). During the second stage, taking place sometime after the student has been placed into the regular classroom, there is a meeting where the parents, teachers, circle of friends, the integrated student, consultants, and any other participants discuss questions such as 'What is [student's name] history?', 'What is your dream for [student's name]?', 'What is your nightmare for [student's name]?', 'What are [student's name] strengths, gifts, and talents?', 'What are [student's name] needs?', 'What would an ideal day for [student's name] look like?' (Forest & Lusthaus, 1989, pp. 51-56; Forest & Lusthaus, 1990). The MAPS process may also be used as an informal method of IEP development in which participants may make contributions in a nonthreatening, relaxed atmosphere.

The 'Circle of Friends' approach is similar to the first stage of MAPS and can be used for all grade and disability levels. A core-group of friends for the integrated student is arranged based on voluntary and, ideally, rotating membership. Emphasis is put on true friendship and acceptance with the help of a caring teacher who acts as facilitator (Forest & Lusthaus, 1989). It has been pointed out that students with disabilities should not be denied the opportunity to associate freely with other disabled individuals (Ferguson & Asch, 1989). If many of them decide to form strong bonds with other disabled persons, it is their own legitimate preference since inclusive schooling should give them the opportunity to associate with whomever they choose.

In a similar manner rap sessions and buddy systems may help in creating a cooperative classroom environment. The former may involve topics such as kinds and degrees of disability,

effects on learning and behavior, arising difficulties, and expectations. Rap sessions are risky because they require skillful management to help students understand individuals with disabilities. If conducted inappropriately they may produce negative results. Buddy systems pair disabled and nondisabled students (rotation is highly recommended). In employing buddy systems, care should be exercised in finding nondisabled students who would encourage independence, not dependence, on the part of the nondisabled student (Gearheart, Weishahn, & Gearheart, 1992, pp. 131-132).

Cooperative goal structuring involves situations where the task goals can only be achieved by the common participation of all team members. Team membership is heterogeneous and may vary in size but three or four members per team are judged as the most appropriate size. The teacher makes clear what the goals are and that they can only be accomplished by collective effort. Skills such as helping, tutoring, teaching, and sharing are taught and rewards are based on group results. It is thought that this method enables disabled and nondisabled students to interact socially and learn from each other. It may be used for all grade levels and primarily for mild to moderate disabilities (Johnson & Johnson, 1986; Johnson, Johnson, Nelson, & Read, 1978).

In small group teaching, students are assigned to a heterogeneous two-to-six member team that chooses one topic. The teacher clearly explains the ground rules and goals of the project. Subdivision of responsibilities may occur within the team. After completion of the individual tasks, the team members jointly prepare for presentation. The presentation is evaluated by both the entire class and the teacher (Sharon & Sharon, 1976).

In the jigsaw method the teacher assigns students to heterogeneous teams. The learning task is divided in as many sections as there are team members and each student is responsible for one section. After studying, students teach their section to the other group members and put together the whole unit. The teacher may evaluate the work either individually or collectively (Aronson, 1978; Slavin, 1978).

In team-games tournament the teacher assigns four or five students to heterogeneous teams. Students are given academic work, following the teacher presentation, and quiz each other for preparation. Based on their ability, students from each team are then assigned to different tables where they may compete with students of their own academic level. Thus, students of high ability can compete with other students of high ability. Individual scores contribute to the overall team score (DeVries & Slavin, 1978). This method is an interesting blend of cooperative and competitive learning. It may be one approach that can prove beneficial by including all students - labeled 'gifted' or 'disabled' - in the learning process. A number of books have been published on cooperative instructional and recreational games with detailed descriptions and suggestions (Deacove, 1974; Fluegelman, 1976, 1981; Harrison & The Nonviolence and Children Program, 1976; Orlick, 1978, 1982; Weinstein & Goodman, 1980).

Student Peer Tutoring

It has been pointed out that students may be seen as solutions in helping students with disabilities (Forest & Pearpoint, 1990). Most cooperative learning approaches utilize peer tutoring in various forms. Even though tutoring in the regular classroom can be conducted by paraprofessionals, parents, and community volunteers (Schulz, Carpenter & Turnbull, 1991, pp.

178-184), teachers seem to have a preference for student peer tutors (Simmel, Cohen, & Kandaswamy, 1980). Despite this preference, peers are probably the most underutilized source of support for teachers and students with disabilities (Damon, 1984).

There are several configurations of peer tutoring. There can be classwide student tutoring teams where all students learn and teach in their heterogeneous small teams (Maheady & Pernel, 1987). This form of tutoring has been used with students with behavioral disorders, mental disabilities, hearing impairments, learning disabilities, autism, and high risk and minority children (Delquadri, Greenwood, Whorton, Carta, & Hall, 1988). There can be cross-age programs where older students act as tutors (Jenkins & Jenkins, 1981). Even students with disabilities may take the role of tutor to help other disabled or nondisabled students (Maher, 1986; Osguthorpe & Scruggs, 1986; Stainback, Stainback, & Hatcher, 1983).

Jenkins and Jenkins (1987) have outlined a number of guidelines for successful tutoring programs: structured tutoring session formats; clear objectives based on classroom curriculum and evaluation of outcomes on the basis of these objectives; careful selection of tutoring content; reflection on frequency, duration, and scheduling of tutoring sessions; careful selection and thorough training of tutors; constructive classroom environment and close teacher supervision; and frequent evaluation of student learning.

Peer tutoring has been described as an effective classroom strategy for all students (Gartner & Lipsky, 1990). Research evidence has been accumulating about its effectiveness (Cohen, Kulik, & Kulik, 1982; Jenkins & Jenkins, 1981; Maheady, Sacca, & Harper, 1987). A review of more than twenty studies involving peer tutoring of students with learning disabilities came to the conclusion that it is the best method for generating enthusiasm among students and

that it bears positive effects on self-concept, attitude toward school, cooperation, social behavior, and time on task (Scruggs & Richter, 1988). In addition to having beneficial impact on students with disabilities tutors also gain in a similar manner (Damon, 1984; J. Featherstone, 1987).

Emerging Themes

The themes in this chapter have been grouped in five categories. In the first category, the positive and negative outcomes of PL 94-142 are discussed in conjunction with the various mainstreaming models and educational placements of students with disabilities at the national and state levels. In the second category, the obstacles to integration as seen by mainstreaming advocates are summarized. In the third category, the merging of regular and special education, or 'purposeful' mainstreaming, is discussed as having the elements to form an adequate option, given certain social conditions. These conditions are discussed in the following chapters. In the fourth category, a summary of the proposed changes (by mainstreaming advocates) for the merger option is given.

Public Law 94-142, for the most part, has been interpreted within traditional special education philosophy which tends to ignore social influences. The following statement summarizes this philosophy:

From an empirical perspective, we offer the observation that overreferral, overidentification, and schism between regular and special education represent judgements based on the philosophical position one holds and the data to which one chooses to attend (Kauffman, Gerber, & Semmel, 1988, p. 7).

It would probably be more germane to offer the observation that many compartmentalized disciplines in educational, biological, and social sciences tend to exclude deliberately, not just

ignore, research findings and whole systems of thought, not just data (the term 'data' has the connotation of relatively uninterpreted information). These disciplines behave no differently from any other social units: inconvenient information is discarded because it does not fit into their general theoretical or philosophical framework.

Public Law 94-142 has been treated similarly in American schools and courts. It has been interpreted within the existing social-educational context which is based on conceptions, beliefs, and attitudes that favor 'pull out' programs. The pairing of potentially 'disabling policies' and progressive legal mandates (Gartner & Joe, 1987) in PL 94-142 has had contradictory outcomes. On the one hand, students with disabilities are now perceived as the educational responsibility of public education, the establishment of procedural mechanisms offer some protection to these students and their parents, and experimentation with alternative service delivery models has greatly increased. On the other, there has been a renewed drive to classify 'unidentified' students, the law has been interpreted in a narrow (or socially constrained) manner, due process has been established within special education without any regard for conflict of interest, and the expansion of bureaucracy has in many cases made parents and students feel even more powerless.

The inadequacies of the law become evident when examining the prevailing practices and placement patterns regarding students with disabilities. Out of the three mainstreaming models that have been recognized - 'teacher deals', 'island in the mainstream', and 'purposeful integration' - only the latter is seen as attempting to integrate all students programmatically. The first two models represent occasional 'mainstreaming' which makes no effort to modify the structure and organization of schools. According to the inclusive education classification scheme that was developed for purposes of this study (see **Tables 13 & 14**), most states appear to be

practicing mainstreaming based on the 'teacher deals' and 'island' models. The educational placement patterns vary widely among states - an indication that the law has been applied differentially. The states of Alaska, Idaho, Maine, Montana, Nebraska, New Mexico, North Dakota, Oregon, and Vermont were classified as being closer to the 'purposeful integration' model. The states grouped either in the MIE, LIE, CP, or Residual categories have probably adopted the first two models of mainstreaming. Programmatic research, nevertheless, is needed to examine the extent to which educational changes in the MIE category are meaningful and beneficial from the disabled students' and their parents' point of view. It is suggested that such research be conducted in a social-historical context.

At the national level, the placement trends of the various categories of disability between 1977-78 and 1988-89 have varied widely (see **Tables 9, 10, 11, and 12**). Little change has occurred in the learning disability category, a finding with significant implications since it is the largest disability category. In the serious emotional disturbance and mental retardation categories (caution has been previously noted for mental retardation category) relapse from less restrictive to more restrictive environments has taken place. Improvement from more restrictive to less restrictive placements has ensued in the orthopedic handicap, speech impairment, hard of hearing and deaf, and visual handicap categories. In the health impairment, multihandicap, and deaf-blind categories the contradictory development of concurrent movement toward both less restrictive and more restrictive placements has occurred. It has been pointed out that with regard to age, students with disabilities in older-age groups tend to be placed in more restrictive environments than students with disabilities in younger-age groups (U.S. Department of Education, Office of Special Education and Rehabilitative Services, 1980, pp. 39-40; 1986, pp. 9, 11; 1991, pp. 21-25).

National placement patterns of the disability categories also differed widely for academic year 1988-89 (see **Table 12**). Students with mild to moderate disabilities - learning disabilities, speech impairments, and visual handicaps - were mainly placed in less restrictive environments. Students with severe disabilities - mental retardation, multihandicaps, and deaf-blindness - were served in more restrictive settings. Students with the serious emotional disturbance label tended to be placed in more restrictive environments. Students in the orthopedic handicap, other health impairment, and hard of hearing and deaf categories tended to be distributed almost equitably between less restrictive and more restrictive settings.

When all disability category statistics are collapsed in one group, however, there is little or no change in placements between 1977-78 and 1988-89. The combined regular class and resource room placements were 68% in 1977-78 (**Table 9**) and 68.6% in 1988-89 (**Table 12**), with an increase of approximately four percentage points in regular class placement and a comparable decrease of about four percentage points in resource room placement between 1984-85 and 1988-89 (**Tables 10 and 12**). Special class placement was 25.3% in 1977-78 (**Table 9**) and 24.4% in 1988-89 (**Table 12**). The combined separate facilities and other separate environment placements were 6.7% in 1997-78 (**Table 9**) and 6.9% in 1988-89 (**Table 12**).

Overall, at the national level between 1977-78 and 1988-89 there has been little progress toward less restrictive placements for the vast majority of students with disabilities. At the same time, however, a number of states have implemented the LRE requirement of PL 94-142 to a considerable degree.

Several obstacles to mainstreaming and inclusive education have been discussed: existing funding patterns and classification and labeling procedures, dichotomy between regular and

special education, school organization and routines, teacher resistance, teacher preparation programs, vested interests, court decisions regarding professional and parental authority on the issue of educational placement, lack of adequate support for teachers and students with disabilities in the mainstream, and the 1980s' educational movement advocating 'excellence'.

Funding patterns have contributed to 'head-hunting' of students with problems with the objective of classifying them as having some form of mild disability. The traditional designation of a considerable amount of fiscal and human resources to identification and classification and the provision of special education services upon identification have certainly rendered a large part in this development.

The continuing separation of regular and special education, which is reinforced in part by existing funding patterns, has acted so far as a force that undermines the development of alternative practices based on 'purposeful integration'. It would be naive to expect that it could have been otherwise.

In the same realm, school organization and routines have functioned to thwart mainstreaming. Inflexible grade levels, noncollaborative teaching practices, rigid scheduling, the prevalence of homogeneous grouping and competitive learning are incompatible with inclusive education.

Teacher resistance has been reinforced by existing school organizational patterns and routines as well as by teacher preparation programs and traditional special education philosophy. In this process, many teachers have come to miscomprehend systemic inadequacies of American education as flaws of mainstreaming philosophy and practice.

Vested interests have presented another leading obstacle. Many regular and special educators, academics and researchers, and administrative personnel have interests that are contrary to integration. Regular and special educators have laid claim to what they perceive as mutually exclusive knowledge and territories. Researchers have built their reputation and careers on the basis of two separate branches of education. And administrators, or even many parents of students with disabilities, are reluctant to endorse practices that may result, because of existing funding patterns, in full or partial loss of financial support for special programs.

The lack of adequate support for teachers and students with disabilities in regular classrooms is linked to many of the problems mentioned above. Funding for mainstreaming programs is inadequate, personnel is insufficiently trained or resistant, or existing service delivery models are incompatible.

In addition, court decisions have undermined parental authority with respect to educational placement by establishing professional authority as more knowledgeable on this matter. It is not unexpected then that parental participation has been found to be very low in educational decision making.

Finally, the push for higher academic standards during the 1980s has marginalized special education in the public debate regarding the condition of American education. There is even evidence that the insistence on 'excellence' and 'quality' has incited an increase of referrals of underachieving students to special education.

All these obstacles presented to mainstreaming have logically prompted many educators to advocate the merger option. It is perceived that integration of personnel and resources in special and regular education is as necessary as the integration of students with disabilities in the

mainstream. Opponents have claimed that proponents of the merger have not done policy analysis but policy advocacy only (McKinney & Hocutt, 1988). According to Gallagher (1981) it is not uncommon to mistake policy advocacy for policy analysis. Policy analysis is defined as "the use of reason and evidence to choose the best policy among a number of alternatives" (MacRae & Wilde, 1979, p. 4) in combination with certain values that are bound to influence this choice (Moroney, 1981). In contrast, policy advocacy is a means by which limited resources are secured for specific aims (Weintraub, 1976). Criteria that should be used for policy analysis include research evidence, economic and political feasibility, existing organizational efficiency, effectiveness, ease of implementation, acceptance by all participants, and impact on educational systems and participants (McKinney & Hocutt, 1988). Another criterion that would provide a more holistic perspective is a social-historical element.

Even though disjointedly, some policy analysis has been done by advocates of the merger option (or 'purposeful' mainstreaming). There does not appear to have been a holistic, systematic attempt at policy analysis but the general conclusion of merging special and regular education as the best alternative seems to be valid, provided certain social conditions are present. The criteria of research evidence, economic feasibility, and existing organizational efficiency (or more accurately inefficiency of the present educational system) have more or less been satisfied. The criterion of effectiveness is currently being addressed by research on and implementation of collaborative consultation and teaming (e.g. Bauwens, Hourcade, & Friend, 1989; Polsgrove & McNeil, 1989; Villa, 1989; Villa & Thousand, 1988).

A rather restricted analysis, however, has been conducted with respect to the social-historical context, political feasibility, ease of implementation, acceptance by all participants, and

impact on educational system and participants. This shortcoming does not detract from the validity of the merger option, since in reality policy analysis and policy advocacy move concurrently by mutual feedback and trial and error. Nevertheless, a relatively comprehensive theoretical perspective can inform a general strategic route and avoid many trial and error situations. Much of the framework for guiding an adequate policy analysis of and advocacy for the merger option does exist and is discussed in the following chapters.

The merger option bases its philosophy of disabilities on a combination of the 'minority group' and 'moral community' perspectives. It has been consistently documented that there is a disproportionate number of students from minority, culturally different, and disadvantaged groups identified as disabled. Assessment and classification procedures and teacher expectations have been attacked as ethnocentric and biased. A majority of people with disabilities feel that they consider themselves to be a distinct minority group. The implication is that the community has, or should have, the responsibility to integrate socially and academically all individuals with disabilities.

The merger alternative is the operationalization of the concept of 'purposeful integration'. In merging special and regular education personnel and resources there is a programmatic effort to modify the organizational structure and operation of schools. Perhaps the most central ideas are unconditional inclusion, acceptance of diversity, expansion of curriculum to include community integration, and the establishment of systemic structures and processes that allow and promote purposeful integration.

These systemic structures and processes include the three closely linked concepts of support networking, collaborative teaming, and cooperative learning. Support networking

represents the structural element through the interconnection of its various collaborative teams. These teams construct formal and informal links within a network that supports its interdependent constituents. Collaborative teaming embodies the general process model of networking. Espousing a philosophy of acceptance and a problem solving approach individuals with different areas of expertise work together to educate all students with and without disabilities. It is no coincidence that many schools in the state of Vermont (Thousand & Villa, 1989, 1990), which was classified as a state with a high practice of inclusive education, use the collaborative teaming model. Cooperative learning activities, the third component, represent the specific strategies in learning situations. All of these strategies utilize heterogeneous grouping.

Most of the barriers to purposeful integration have direct relevance to inertia and tradition. Changes in some parts of the education system, depending on the resistance power of inertia and tradition, may or may not effect changes in other parts. Mainstreaming advocates have suggested that the following need changes: the paradigm of special education and perspective on disabilities; education law; funding patterns; identification and classification practice; perceptions and attitudes of the public, teachers, professionals, administrators, and students; teacher preparation programs and certification requirements; school organization and routines; isolationist, noncollaborative school practices; competitive school processes and learning; homogeneous grouping practices; low parental participation; and vested interests.

It is interesting to note that most of these proposed changes are school-based. No doubt they are necessary, but it is questionable whether they are *sufficient* to achieve the intentions and goals of 'purposeful' mainstreaming. The fundamental reasons of segregation of students with disabilities do not reside in schools but in society. The following chapters examine how schools

have been influenced by the general social-historical context in the United States. When formal education, special education, and mainstreaming are situated into this wider context, it becomes apparent that school level conditions are the symptoms rather than the causes of exclusion of students with disabilities.

CHAPTER 7

The Reconstitution of State and Corporate Authority: The Educational Reforms of the 1980s

The examination of the education reforms of the 1980s occupies a central place in this attempt to place mainstreaming and inclusive education within the wider educational and social contexts. Many of the stated priorities of the reformers were in contradiction with the philosophy of inclusion. Even more importantly and despite the humanitarian and equity rhetoric of national reports and other documents on education, the hidden objective of social control for the benefit of state and corporate interests may have had a detrimental effect on disadvantaged (or 'at risk') students, of whom students with disabilities are part. There is consensus among conservative, liberal, and radical critics of the reforms that the stated objectives have largely been met with failure. The hidden objective of social control, however, is seen as being met with considerable success. It is perhaps too early to predict the extent to which disadvantaged students will be affected, but it appears that there is a high potential for socially controlled marginalization of a much larger population of children than those currently in disability categories. The foundations of this scheme, euphemistically referred to as 'interagency collaboration' (Payzant, 1992), are currently being laid.

The 1980s' Reform Movement for 'Excellence' in Education

Within two years following the presidential election of Ronald Reagan, T. Bell, secretary of education, appointed a panel of largely professional, business, and educator members to

examine the state of American education and suggest reform proposals. The National Commission on Excellence in Education released its report in 1983 - entitled *A Nation at Risk* - as an open letter to the public. The report was written in a stunningly alarmist and condemnatory tone about the state of American schooling, economy, and global eminence. The introductory paragraphs stated:

Our Nation is at risk. Our once unchallenged preeminence in commerce, industry, science, and technological innovation is being overtaken by competitors throughout the world. This report is concerned with only one of the many causes and dimensions of the problem, but it is the one that undergirds American prosperity, security, and civility. We report to the American people that while we can take justifiable pride in what our schools and colleges have historically accomplished and contributed to the United States and the well-being of its people, the educational foundations of our society are presently being eroded by a rising tide of mediocrity that threatens our very future as a Nation and a people. What was unimaginable a generation ago has begun to occur - others are matching and surpassing our educational attainments.

If an unfriendly foreign power had attempted to impose on America the mediocre educational performance that exists today, we might well have viewed it as an act of war. As it stands, we have allowed this to happen to ourselves. We have even squandered the gains in student achievement made in the wake of the Sputnik challenge. Moreover, we have dismantled essential support systems which helped make those gains possible. We have, in effect, been committing an act of unthinking, unilateral educational disarmament (National Commission on Excellence in Education, 1983, p. 5).

The Conservative Coalition

The report set the mood of educational reform during the 1980s. Understanding the political climate of the era and the social forces that propelled a Republican administration into office is important. After the tumultuous 1960s and 1970s, there was a public switch toward a more conservative political disposition. A broad coalition between neoconservative groups and what came to be called the New Right were at the core of this political change.

In educational matters, the neoconservatives were represented by individuals such as Nathan Glazer, James Q. Wilson, Chester E. Finn, Daniel P. Moynihan, James Coleman, Joseph Adelson, Terrel Bell, Albert Shanker, Diane Ravitch, Dennis Doyle, William J. Bennett, Edward Wynne, and Gerald Grant. Neoconservative groups had strong connections to the American Enterprise Institute, the Hudson Institute, the National Endowment for the Humanities, the U.S. Department of Education, business organizations such as the Committee for Economic Development and the Business Roundtable, and to various publications such as *Public Interest* and *Commentary*. The National Commission on Excellence in Education, the Twentieth Century Fund's Task Force on Federal Elementary and Secondary Education Policy, the National Task Force on Education for Economic Growth, and the Business-Higher Education Forum - to mention a few sources of influential educational reports - were largely composed of neoconservative leaders. Their educational agenda, as they presented it, included economic growth, preservation of a common American culture based on western heritage, higher academic standards, equity, a larger role for private schools, disestablishment of compulsory school desegregation, and relaxing of federal legislation and court decisions regarding student rights and students with disabilities (Pincus, 1985, pp. 33-339; Toch, 1991, pp. 55-56).

The New Right was represented by scholars including Eileen Gardner, Russell Kirk, E. G. West, David Armor, Thomas Sowell, George Gilder, Senators Orrin Hatch and Jesse Helms, fundamentalist religious leaders Jerry Falwell and Tim Lettay, textbook analysts Mel and Norma Gabler, and supply-economist Arthur Laffer. Some of the organizations that represented the New Right included the Heritage Foundation, Committee for Survival of a Free Congress, Conservative Caucus and its Research and Education Foundation, National Conservative Political Action

Committee, Life Advocates, Stop-ERA, Leadership Foundation, Life Amendment Political Action Committee, National Federation for Decency, Save Our Children, Educational Research Analysts, Citizens for Educational Freedom, National Christian Action Coalition, Moral Majority, Catholic League for Religious and Civil Rights, and the American Legislative Exchange Council. Their targets included abortion, homosexuality, feminism, pornography, the Equal Rights Amendment pertaining to affirmative action and various minorities (racial-, linguistic-, disability-, and gender-related), secularism, school integration and forced busing, and teaching of the theory of evolution and the ban on prayer in public schools (Pincus, 1985, p. 331; Lucas, 1984, pp. 55-61).

The coalition between the neoconservatives and the New Right was fragile from the very beginning. The former wanted the involvement of the federal government to overhaul public schools in a neoconservative image, while the latter demanded the complete withdrawal of federal involvement and wanted to shape education policy at the state and local level according to christian fundamentalist conceptions (Pincus, 1985, pp. 339-342). The reform movement was largely monopolized by neoconservatives who held positions of political power and rejected in practice most of the New Right agenda. New Right groups ran a morality campaign in schools across the country and succeeded in many instances in banning or censoring a variety of books. Not succeeding in ousting secularism from public schools, however, they created thousands of christian academies during the 1980s (Lucas, 1984, pp. 55-61).

In rejecting most of the fundamentalist educational agenda and proclaiming an academic vision of public education for all students, neoconservatives succeeded in aligning a large number of more liberally-minded educators (Toch, 1991, p. 56) such as John I. Goodlad, Ernest L. Boyer,

or Theodore R.Sizer and consortiums or organizations such as The Holmes Group or the Carnegie Foundation. As stated in the *A Nation at Risk* report, and strategically duplicated on page 4 following the three-page introduction, it appeared that the reform movement was committed to both excellence and equity:

All, regardless of race or economic status, are entitled to a fair chance and to the tools for developing their individual powers of mind and spirit to the utmost. This promise means that all children by virtue of their own efforts, competently guided, can hope to attain the mature and informed judgment needed to secure gainful employment, and to manage their own lives, thereby serving not only their own interests but also the progress of society itself (National Commission on Excellence in Education, 1983, p. 8).

This dedication was stated again in the following:

We do not believe that a public commitment to excellence and educational reform must be made at the expense of a strong public commitment to the equitable treatment of our diverse population. The twin goals of equity and high-quality schooling have profound and practical meaning for our economy and society, and we cannot permit one to yield to the other either in principle or in practice (National Commission on Excellence in Education, 1983, p. 13).

Despite this proclaimed commitment to equity, advocates of the reform movement were sending mixed messages. On the one hand, it was claimed that the exemption of disadvantaged students from challenging academic work was in itself elitist (Finn, 1983; Finn, Ravitch, & Fancher, 1984, pp. 240-241) or that disadvantaged students were harmed by low expectations (Graham, 1984). On the other hand, there was an emphasis on promoting high-ability students (J . H. U. Brown & Comola, 1991, p. 52), academic subjects (Ravitch, 1983, p. 51), and competition in schools (Finn, 1983, 1984). Chester Finn (1980, 1984), who was according to Toch (1991) "perhaps the single most powerful intellectual voice within the excellence movement in the early 1980s" (p. 56), attributed the declining state of American schools to the liberal

policies of the 1960s and 1970s of striving to provide equality of access while sacrificing quality.

Brown and Comola (1991) have expressed the latter message quite succinctly:

America's shame is its schools. We have no commitment to learning, no evidence that a student is taught to his potential....We have been more concerned with discrimination and education of the less talented than training the leaders of the next generation (p. 43).

We spend large sums of school funds on the "special" child and neglect the really special child, the gifted pupil. It has been said with some truth that the majority of all inventions and new ideas come from 5 percent of the population. It is these to whom we should pay attention (p. 52).

We should be proud of a certain degree of elitism. No person and no nation can advance without it....Elitism is as important in education as it is in arts or music where it has been accepted as a norm (p. 52).

The effect of all these contradictory messages during the 1980s was the redefinition of equal educational opportunity. As William J. Bennett (1988a) phrased it "[r]eal educational opportunity means equal intellectual challenge for all students" (p. 31).

But to what extent was the rhetoric about higher academic standards and academic education for all representative of the intentions behind it?

National Commission on Excellence in Education: A Nation at Risk

The unifying theme of the report was that urgent educational reform is needed to close an increasing educational and economic gap between the U.S. and other leading industrialized nations such as Japan and Germany. The whole argument about lagging academic standards was based on the following: comparisons of international standardized achievement test scores in which American students have been consistently outranked; declining Scholastic Aptitude Test (SAT) and other standardized test scores in verbal ability and English, mathematics, and science;

an increase in remedial mathematics courses in public colleges; the classification as functionally illiterate of 23 million adult Americans, 13% of all 17-year-olds, and up to 40% of minority youngsters; the inability of almost 40% of 17-year-olds for inferential reasoning from written material; the inability of 80% of 17-year-olds to write persuasive essays; inability of almost 66% of 17-year-olds to solve multiple-steps mathematics problems; and the protestations of business and the military that they have to allocate millions of dollars for remedial and training programs in reading, writing, spelling, and arithmetic (National Commission on Excellence in Education, 1983, pp. 8-9).

The commission explicitly linked the decline in these indicators to America's declining productivity and economy:

More and more young people emerge from high school ready neither for college nor for work. This predicament becomes more acute as the knowledge base continues its rapid expansion, the number of traditional jobs shrinks, and new jobs demand greater sophistication and preparation (National Commission on Excellence in Education, 1983, p. 12).

This connection was followed to its logical conclusion that education will be the key for success in the coming age of international economic competition:

The world is indeed one global village. We live among determined, well-educated, and strongly motivated competitors. We compete with them for international standing and markets....

The risk is not only that the Japanese make automobiles more efficiently than Americans...It is not just that the South Koreans recently built the world's most efficient steel mill, or that American machine tools...are being displaced by German products. It is also that these developments signify a redistribution of trained capability throughout the globe. Knowledge, learning, information, and skilled intelligence are the new raw materials of international commerce...Learning is the indispensable investment required for success in the "information age" we are entering (National Commission on Excellence in Education, 1983, pp. 6-7).

The worries of the Commission were not restricted to economic affairs. They also centered on civic responsibilities that could be affected by the rapid pace of technological change:

The people of the United States need to know that individuals in our society who do not possess the levels of skill, literacy, and training essential to this new era will be effectively disenfranchised, not simply from the material rewards that accompany competent performance, but also from the chance to participate fully in our national life. A high level of shared education is essential to a free, democratic society and to the fostering of a common culture, especially in a country that prides itself on pluralism and individual freedom.

For our country to function, citizens must be able to reach some common understandings on complex issues (National Commission on Excellence in Education, 1983, p. 7).

Having established a link between schooling and economic prosperity and in turn binding them to national, cultural, and democratic survival, the commission suggested that "education should be at the top of the Nation's agenda" (p. 18) and urged all Americans to action:

[W]e issue this call to all who care about America and its future: to parents and students; to teachers, administrators, and school board members; to colleges and industry; to union members and military leaders; to governors and state legislators; to the President; to members of Congress and other public officials; to members of learned and scientific societies; to the print and electronic media; to concerned citizens everywhere. America is at risk (National Commission on Excellence in Education, 1983, p. 14).

It was stated that the "declining trend...stems more from weakness of purpose, confusion of vision, underuse of talent, and lack of leadership, than from conditions beyond our control" (p. 15). The desired vision had already been implicated: schooling for economic prosperity to maintain the global prominence of the United States. This vision was the driving gear that defined the framework for educational reform of the public schools.

Consequently, the Commission focused on what it perceived to be the problems of American schools: "disturbing inadequacies in the way the educational process itself is often conducted" (p. 18). They specified these inadequacies as deficiencies in content, expectations,

time, and teaching. In terms of content deficiencies, it was claimed that American schools offer a kind of "curricular smorgasbord...with extensive student choice" (p. 18) and that "[s]econdary school curricula have been homogenized, diluted, and diffused to the point that they no longer have a central purpose" (p. 18). With respect to expectation deficiencies, diminished amount of homework, minimal course requirements in science and foreign languages, extremely low minimum competency requirements for graduation, minimal or nonexistent requirements for admission in many public colleges, and unchallenging textbooks were all mentioned as problematic (pp. 19-21). With regard to time deficiencies, it was pointed out that American students devote less time to homework in comparison to students from other industrialized nations, that time-on-task during classroom and homework is used ineffectively, and that most schools are not preparing students to have good study skills and habits (pp. 21-22). In terms of teaching deficiencies, it was reported that students joining the teaching profession are mediocre, teacher preparation programs are of poor quality, the working and monetary conditions for the average teacher are inadequate, and the number of qualified teachers in mathematics, science, foreign languages, and special education is short of needs (National Commission on Excellence in Education, 1983, pp. 22-23).

In addition the Commission expressed its dissatisfaction with what it perceived to be a wide range of objectives for public schools. In its view, this was an additional reason for their ineffectiveness:

Our society and its educational institutions seem to have lost sight of the basic purposes of schooling (p. 5)

[There is a] multitude of often conflicting demands we have placed on our Nation's schools and colleges. They are routinely called on to provide solutions to personal, social, and political problems that the home and other institutions either will not or cannot resolve. We must understand that these demands on our schools and colleges often exact an educational cost as well as a financial one (p. 6).

In setting this framework, the Commission made several recommendations and expressed the optimism that results would be forthcoming soon:

[T]his commission has agreed on a set of recommendations that the American people can begin to act on now, that can be implemented over the next several years, and that promise lasting reform (National Commission on Excellence in Education, 1983, p. 23).

The content recommendations proposed a core curriculum as a requirement for high school graduation: four years in English, three years in mathematics, three years in science, three years in social studies, half a year in computer science, and two years in a foreign language for students wishing to continue their education in college (pp. 24-27). The expectation recommendations focused on "rigorous and measurable standards" (p. 27), "higher expectations...for academic performance and student conduct" (p. 27), and higher admission requirements by colleges and universities (pp. 27-29). The time recommendations centered on assigning more homework, lengthening the school day and school year, effectively teaching study skills, "better classroom management and organization" (p. 29), "maintaining discipline" (p. 29), reducing "administrative burdens" (p. 30) on teachers, promoting and grouping students based on academic progress and needs, and providing incentives to increase student attendance (National Commission on Excellence in Education, 1983, pp. 29-30).

The teaching recommendations concentrated on the following: improving teacher preparation programs through higher standards, actively recruiting highly qualified students, and

utilizing master teachers; providing competitive salaries, longer contracts, and career scales for teachers; and utilizing fast-track certification programs for teachers who already possess a college degree in needed areas such as English, mathematics, and science (pp. 30-31). The leadership and financial support recommendations focused on the following: encouraging active leadership of principals and superintendents in the school community; advocating leadership of local and state officials in funding and governing schools; suggesting leadership of the federal government in the education of exceptional, minority and disadvantaged students and in "identify[ing] the national interest in education....to ensure that the Nation's public and private resources are marshaled to address the issues discussed in this report" (p. 33); and asking for citizen financial and moral support (National Commission on Excellence in Education, 1983, pp. 32-33).

After a recounting of the "remarkable success[es]" (p.33) of American schools in the past, the report concluded on an ominous, yet optimistic tone:

It is by our willingness to take up the challenge, and our resolve to see it through, that America's place in the world will be either secured or forfeited. Americans have succeeded before and so we shall again (National Commission on Excellence in Education, 1983, p. 36).

A Nation at Risk was an instant success upon its release. Its militant language attracted the public's interest, media coverage was intensive, more commissions on education were established, various professional and education organizations were alerted, legislative action was prompted in almost all states, and reform projects and school-business partnerships were initiated (Toch, 1991, pp. 17-39; U.S. Department of Education, 1984). The incumbent president Ronald Reagan pushed this specific educational agenda as one of his major political priorities (see Reagan, 1984). Most of all, the theme of education as a savior of the economy was accepted by almost all sectors of American society, and the need for direct business involvement in

educational reform was echoed in the writings of reform advocates into the 1990s (e.g. Brown & Comola, 1991; Finn, 1991).

'Cultural Literacy'

The *A Nation at Risk* report insisted on academic education and higher standards. Two points in the report with regard to the teaching and content of English and Social Studies deserve particular attention:

The teaching of English in high school should equip graduates to...know our literary heritage and how it enhances imagination and ethical understanding, and how it relates to the customs, ideas, and values of today's life and culture (p. 25).

The teaching of social studies in high school should be designed to: (a) enable students to fix their places and possibilities within the larger social and cultural structure; (b) understand the broad sweep of both ancient and contemporary ideas that have shaped our world;...(c) understand the fundamentals of how our economic system works and how our political system functions; and (d) grasp the difference between free and repressive societies (pp. 25-26).

The vagueness of the wording in these two paragraphs is quite apparent. In the former quotation, what does "our literary heritage" mean? Does it mean American literature? Does it include other western writers? Does it encompass all the cultures of the various sectors of American society (Caucasian-American, African-American, Chinese-American, Native-American, Japanese-American, etc.)? How about writers from various parts of the Third World who write in English? Should secondary students have access to social studies courses on other cultures?

Conservative advocates of the reform movement made it quite clear that what they had in mind is exclusively grounding American education on western culture. They made the accusation that, especially in higher education, there are attempts to discredit western heritage, an attempt that should be resisted (e.g. Bennet, 1984; Bloom, 1987; A. C. Carlson, 1984; Cheney,

1987; G. Grant, 1988). In *Cultural Literacy*, E. D. Hirsch (1987) argued that there is a lack of historical perspective in schools and that history subjects in secondary schools should be geared toward transmitting common American culture and its values. Similar arguments were made by Bill Honig (1985) in *Last Chance for Our Children*. William J. Bennet (1988b) maintained that in order to achieve the implementation of these goals there should be action to regain and reestablish consensus in grounding American education on western heritage.

In the latter quotation of the report, several points about the function of social studies in American schools are clear upon close inspection. First, to "enable students to *fix their places* and possibilities within the larger *social and cultural structure*". With regard to the cultural aspect, conservative advocates made it quite explicit that the possibilities should be confined to the western heritage. With respect to the social aspect, given the historical reproductive function of schools, the underlying semantics seemed to signify restricted opportunities for social mobility. Second, to "*understand the fundamentals of how our economic system works and how our political system functions*". The assumption was that the socioeconomic system of the U.S. works and functions without any significant problems. Based on this assumption, the students will be expected to understand the facts of how the system works and functions, not why it is this way, not what its problems are, and not whether there may be other sociopolitical possibilities. Third, to "*grasp the difference between free and repressive societies*". The key word here is 'grasp' - it is not 'analyze', not even 'understand'.

What these quotations appeared to indicate, within the social context of the 1980s' reforms, is a disguised attempt at renewing the historical acculturation and social control functions of American public schools. There was no mention of fostering or accepting cultural

diversity nor genuine critical thinking. What are, then, the implications for 'at risk' student populations?

Disadvantaged Students in the Equation of 'Excellence'

John I. Goodlad (1984) described in *A Place Called School* the harmful effects of pervasive tracking practices in American schools (pp. 130-166). He expressed his strong opposition to its continuation but was not very optimistic about the possibility of a voluntary cessation:

*The continuation of this folly tempts me to urge its mandatory abolition....
....[T]his practice is so embedded and has proved to be so intransigent that it is
more likely to be settled by the courts than by persuasion. And since tracking
appears to block the poor and disadvantaged from access to knowledge...pressure
to abolish it undoubtedly will find its way to the judicial branch of government (p.
297).*

And he went on to state that the "decision to track is essentially one of giving up on the problem of human variability in learning. It is a retreat rather than a strategy" (p. 297). To avoid tracking, he proposed a common core curriculum and random assignment of all students to ensure heterogeneity in all classrooms.

The *A Nation at Risk* report, however, came to a quite different conclusion. Although not explicitly stated, several recommendations of the commission appeared to favor tracking. These recommendations have to be seen as parts of an interconnected whole. Viewed individually they may not appear as favoring tracking, but viewed in conjunction with each other they provide a framework for the continuation of existing practices:

We must emphasize that the variety of student aspirations, abilities, and preparation requires that appropriate content be available to satisfy diverse needs. Attention must be directed to both the nature of the content available and to the needs of particular learners. The most gifted students, for example, may need a curriculum enriched and accelerated beyond even the needs of other students with high ability. Similarly, educationally disadvantaged students may require special curriculum materials, smaller classes, or individual tutoring to help them master the material presented (p. 24).

The Federal Government, in cooperation with States and localities, should help meet the needs of key groups of students such as the gifted and talented, the socioeconomically disadvantaged, minority and language minority students, and the handicapped. In combination these groups include both national resources and the Nation's youth who are most at risk (p. 32, point 3 of recommendation implementations on leadership and fiscal support).

Standardized tests of achievement...should be administered at major transition points from one level of schooling to another and particularly from high school to college or work. The purposes of these tests would be to: (a) certify the student's credentials; (b) identify the need for remedial intervention; and (c) identify the opportunity for advanced or accelerated work (p. 28, point 3 of recommendation implementations on standards and expectations).

The time available for learning should be expanded through better classroom management and organization of the school day. If necessary, additional time should be found to meet the special needs of slow learners, the gifted, and others who need more instructional diversity than can be accommodated during a conventional school day or school year (p. 29, point 4 of recommendation implementations on time).

The burden on teachers for maintaining discipline should be reduced through the development of firm and fair codes of student conduct that are enforced consistently, and by considering alternative classrooms, programs, and schools to meet the needs of continually disruptive students (pp. 29-30, point 5 of recommendation implementations on time).

Placement and grouping of students, as well as promotion and graduation policies, should be guided by the academic progress of students and their instructional needs, rather than by rigid adherence to age (p. 30, point 8 of recommendation implementations on time).

When placed within the larger context of the tightening of cultural range in schools, these recommendations may even amplify tracking. The controversy surrounding the adoption of K-8

Houghton Mifflin social studies textbooks in California schools provides an example (see Berenson, 1992; Ellis & Epstein, 1992). Students whose experience, interests or cultural background are not reflected in the curriculum and practices of the school are potential targets for identification as 'slow learners', 'behavior problems', or 'learning disabled'. It would not be surprising if within the next few years there may be a surge in the number of students identified as 'emotionally disturbed' and 'learning disabled' or in arrangements for classification of some other form.

Some of the Other Reports

It is almost impossible to examine or even list all the educational reports that came out in the 1980s. Comprehensive, though undoubtedly not exhaustive, lists of reports and relevant bibliographies can be found in Altbach, Kelly, and Weis (1985, pp. 275-287) and in Timpane and McNeill (1991, pp. 38-52).

Of particular interest is a strand of reports that were produced by eminent educational researchers such as Boyer (1983), Goodlad (1984), andSizer (1984). They differed from other highly publicized reports in many respects. First, they were the effort of more liberal-minded educators. Second, they envisioned the business sector as playing an important role in educational reform but not an overwhelmingly dominating one. Third, they emphasized a general academic education - not just the domination of science, mathematics, and technology - where critical thinking would occupy a central part. Fourth, many of their proposals had a tone of qualitative change, not just more of the same. In the words of Ernest Boyer (1983) "[m]ore substance, not more time, is our most urgent problem" (p. 84).

The Holmes Group (1986), a consortium of deans of education from various universities across the U.S. released its own report in 1986. Their central objective was "organized around the twin goals of the reform of teacher education and the reform of the teaching profession", and stated their "wishes to see nothing less than the transformation of teaching from an occupation into a genuine profession" (p. ix). In the report they proposed the following: achieving competent teaching grounded on subject knowledge-base, knowledge of pedagogy, and practical experience; tightening admission, certification, and career development requirements through prolonged preparation at the graduate level and lengthening of satisfactory practical experience; and developing partnerships between faculties of education and schools to establish 'ideal' school sites for teacher training (pp. 61-68). Quite similar proposals were made by the Carnegie Forum on Education and the Economy (1986) with respect to teacher preparation (pp. 55-103). The composition of many other reports on teacher education (e.g. Clifford & Guthrie, 1988; Feistritzer, 1984) made it apparent that teacher education and practice was at the heart of the 1980s' reform movement.

One of the most influential reports was authored by the Education Commission of the States, Task Force on Education for Economic Growth (1983). Out of its forty-one members, eleven were state governors and thirteen chief executive officers of major corporations such as IBM, the Ford Motor Company, and the Dow chemical company. This commission worked within the *A Nation at Risk* framework and set specific guidelines and courses of action according to which relatively uniform educational reforms were implemented in most states in the following years. The commitment of state governors to these reforms was renewed three years later in another report (National Governors' Association, Center for Policy Research and

Analysis, 1986). According to Toch (1991) the initiatives taken at the state and local levels were "strikingly similar" (p. 37) reflecting the proposals of the national reports: higher graduation requirements, a longer school year and day, increased teacher salaries, efforts to attract good students to teaching through loans, career ladder opportunities for teachers, higher standards for teacher admission and certification including standardized testing, extensive student standardized testing, fiscal rewards to schools upon student performance on standardized test results, curriculum standardization, and preschool programs (pp. 37-38).

The Corporate-Business Connection

The business community has become a major champion of education reform and has led the calls for both restructuring education and investing in prevention and intervention for the disadvantaged (Committee for Economic Development, Research and Policy Committee, 1991, p. 68).

Indeed, the corporate-business sector has played the single most influential role in setting the policy and implementation framework for educational reform during the 1980s. Business giants such as General Electric, RJR Nabisco, Coca-Cola, and Citibank have been deeply involved in partnerships with schools and in setting public school policy such as increased accountability, school choice, and school-based management. Perhaps one of the most widely known projects is the **Boston Compact** in which business has tied its financial support and expertise to its demands for specific changes in school structures and processes (Committee for Economic Development, Research and Policy Committee, 1991, pp. 67-70).

The Committee for Economic Development

One of the most commanding business organizations with regard to educational reform in the 1980s, which could be called an 'education brainstorming center' for the whole range of the corporate-business community, is the Committee for Economic Development (CED). It was founded in 1942 (CED, 1988, back page of front cover) and as stated in another publication,

CED's work is supported by private voluntary contributions from business and industry, foundations, and individuals. It is independent, non-profit, nonpartisan, and nonpolitical (CED, Research and Policy Committee, 1991, p. 96).

CED is comprised of 250 business leaders and educators (CED, Research and Policy Committee, 1991, p. vi). An examination of its membership as of 1991, however, reveals that the overwhelming majority comes from the business sector. Out of the 250 trustees of the board only 18 members (holding the title of president [13], chancellor [two], dean [one], 'chairman' [one], or professor [one]), represented educational institutions such as University of Houston, New York University, Spelman College, Barnard College, University of California, University of Chicago, University of North Carolina-Chapel Hill, Sarah Lawrence College, Tulane University, Marymount Manhattan College, Florida A&M University, Florida State University, Cornell University, John Hopkins University, University of Wisconsin-Madison, Columbia University, College Board, and Northwestern University (pp. 97-102).

All ~~other~~ trustees, except for 17 members, hold one or more of the titles of 'chairman', 'vice-chairman', president, vice-president, director, chief executive officer, partner, chief administrative officer, corporate economist, consultant, or publisher in major corporations from all the business sectors of American economy. Some of these corporations are BankAmerica, BellSouth, Honeywell, RJR Nabisco, General Mills, Goodyear, Deere, Airbus Industries of North

America, Chase Manhattan, Capital Cities/ABC, Procter & Gamble, Johnson & Johnson, Amtrak, Citicorp and Citibank, American Airlines, Sheridan Broadcasting, Texaco, Dow Chemical Company, Times Mirror Company, United Telecommunications, Texas Utilities, Caterpillar, International Paper Company, Pacific Mutual Life Insurance, Boeing, Chrysler, J.C. Penney, Texas Instruments, Xerox, Union Carbide, Coca-Cola, USA Network, Exxon, Kellogg, IBM, Time Warner, Mobil, Aluminum Company of America, H. J. Heinz, New York Stock Exchange, Ford Motor Company, AT&T, Control Data, BP America, Merrill Lynch, Metropolitan Life Insurance, Washington Post, Federal Express, Northern Telecom, Ralston Purina, The Rockefeller Group, General Electric, ITT, and many others (CED, Research and Policy Committee, 1991, pp. 97-102).

Apart from connections to the above corporations, CED also has ties with the New York Historical Society, The Brookings Institution, the National Coalition of 100 Black Women, the 21st Century Foundation, Emory University, the Friendship Group, Midwest Research Institute, Public Resource Foundation, CBS, MIT, Princeton University, The American Enterprise Institute, Ohio State University, Rochester Institute of Technology, University of Maryland, and the New York Times (CED, Research and Policy Committee, 1991, pp. 97-105). As it is evident, CED has a wide network of connections. It has high-level access to several universities across the U.S., research institutions, and print and electronic media.

Despite CED's claim of being 'nonpartisan' and 'nonpolitical', its membership and its ties with several conservative institutions make it obvious that it is very politically oriented. Its educational agenda is a reflection of corporate interests at stake in American public schools. The CED mandate holds little ambiguity about its constituency and objectives:

CED believes that by enabling business leaders to demonstrate constructively their concern for the general welfare, it is helping business to earn and maintain the national and community respect essential to the successful functioning of the free enterprise capitalist system (CED, Research and Policy Committee, 1991, p. 96).

A Tradition of Involvement

Contrary to popular views, the reform movement of the 1980s is not a new development. Business leaders have always played an active role in shaping American education policy. Timpane and McNeill (1991) have stated it clearly in *Business Impact on Education and Child Development Reform*, a study prepared for CED:

The involvement of business in education is not new. For the first half of this century, industry in America was a strong force behind the movement for universal schooling and for vocational education. Most school board members were business or professional men, and public school management came to be modeled on business management....Curricula, testing, counseling, and placement programs all developed within this comfortable consensus (p. 1).

Schools were shaped on the factory model during the late nineteenth and early twentieth centuries. They were geared toward producing workers for a factory-oriented economy with a corresponding emphasis on a top-down management style. Timpane and McNeill (1991) describe American schools as still operating in the image of the factory model while the world of work and the economy have changed considerably. In consequence, they present business efforts to reform schools in a bottom-up management style as crucial in producing a highly skilled work force which will be ready for life-long learning (pp. 1-4).

Business organizations such as CED have been trying to define the educational agenda along these lines for the last few decades. Since the end of World War II, there has been a growing consensus within the leadership of the business community that American formal

education has been decreasingly performing its reproductive and social control functions because of changing social, economic, and political circumstances. Higher academic standards, education for work, alternative school structures and instructional methods, attention to disadvantaged students, and accountability of student and school performance were all given particular attention in CED's educational agenda before the 1980s (e.g. CED, Research and Policy Committee, 1968, pp. 15, 19, 59-66; 1971, pp. 14, 17, 33-38; McMurrin, 1971abc). The following statements are representative of this agenda:

We believe that the American people should refuse to settle for anything less than universal literacy and those intellectual skills which accompany literacy. Except for less than 1 percent of any population group who are incapable of normal learning, the school should be expected and required to bring their pupils up to minimal standards of intellectual achievement - not some of them but all of them (CED, Research and Policy Committee, 1971, p.13).

[T]here is not a great distance between today's "technical" education and education of the more "academic" variety. Both should be designed to prepare the student for a productive life in the world of work (McMurrin, 1971a, p. viii).

We conceive education's role in this vitally important enterprise to be the instrument by which the disadvantaged enter the mainstream of American life - the same unique role the school played in the assimilation of the millions who came to this country in the great waves of immigration. But in resuming this historic function, education must now adjust to different cultural patterns and personal motivations, as well as to strikingly different economic, social, and technological conditions, from those with which it successfully coped in the late nineteenth and early twentieth centuries (CED, Research and Policy Committee, 1971, p. 13).

While the American schools have generally provided middle- and upper-income youth with the intellectual tools necessary for success in our society, they have commonly failed to cope effectively with the task of educating the disadvantaged youth in our urban centers. To an alarming extent they have simply swept disadvantaged youth under the educational rug (CED, Research and Policy Committee, 1971, p. 9).

Why such a concern about the disadvantaged? To what extent is the humanitarian discourse, permeating all CED education publications, representative of corporate-business intentions?

Rationale for Seeking Education Reform

By 1983, 82% of the leaders of America's corporate executives were expressing the opinion that business should be more involved in education (Lund & McGuire, 1984, p. 4). The reasons given by business leaders for educational reform encompassed a variety of issues: the poor state of American schools, economic productivity and competitiveness, acculturation and Americanization of a new wave of immigrants, and survival of corporate business and capitalism. With regard to the quality of schools the business sector has long proclaimed its dissatisfaction with current arrangements. For example, in 1982 the U.S. Chamber of Commerce distributed a report warning its members that the education system was not prepared to train workers for 'knowledge occupations' (Hemmings, 1982). During the same year, the New York Stock Exchange produced its own report insisting on greater business involvement in educational matters (Epstein & Gels, 1982).

It has been repeatedly proclaimed that educational reform is imperative for sustained productivity and American competitiveness. As expressed by CED's Research and Policy Committee (1991):

In an earlier industrial era, the economy did not need to ensure that every child was well educated....This is no longer the case. In twenty years, just as the baby boom generation begins to retire, the nation could face a labor shortage severe enough to stifle business at every level (p. 2).

The future of America depends on the abilities of its people. Business has an abiding interest and a critical stake in ensuring that today's children grow up to be tomorrow's literate, skilled, adaptable adults who can work more effectively and productively. In view of its special interest, it is incumbent upon business to take the lead in pressing for needed change in policies and practices that affect child development and education, to lend its expertise to help create and sustain the restructuring of these systems, and to become the key advocate of children in the public policy process (p. 89).

Owen B. Butler (1988b), chairman of CED and retired chairman of Procter & Gamble, has been one of the strongest advocates of school reform:

We are trying to change the way we go about educating our young. We are trying to change from a system in which teachers are regarded as almost assembly-line classroom production workers to a system in which teachers are free to innovate and experiment and use creativity to improve teaching. We are trying to deregulate, to move the control of the schools from top-down to bottom-up (p. 4).

The success of the hidden curriculum, or the 'invisible' curriculum as CED prefers to call it, in the past in producing the appropriate type of worker for factory work has been taken as a powerful piece of knowledge for reforming schools:

The invisible curriculum is where the foundations for employability are laid. Schools that develop and reinforce good habits, shared values, and high standards of behavior are most likely to produce graduates who succeed in higher education and work. The foundation for later success should be laid long before kindergarten and should be reinforced throughout the educational process (CED, Research and Policy Committee, 1987, p. 43).

The potentially tremendous power of the hidden curriculum for social control, either positive or negative, has always been there. Corporate business is highly concerned that the 'new' schools will come to employ an 'appropriate' hidden curriculum. This is apparent in a Louis Harris and Associates (1991) study sponsored by CED which came to the conclusion that American education is in "a compelling and depressing" (p. 6) situation today. In this study the attitudes of employers, higher educators, recent students and their parents, and the public opinion

across the U.S. toward recent students were assessed. The fifteen attributes that were used as indicators were: being able to work cooperatively with fellow employees, having the desire to learn more and the capacity to keep learning more on the job, having a good attitude in dealing with those under them, learning how to dress and behave well, having a good attitude toward supervisors, being able to read and understand written and verbal instructions, having the capacity to concentrate on the work done over an extended period of time, learning how to read well, being motivated to give all they have to the job they are doing, being capable of doing arithmetic functions, learning mathematics well, having a real sense of dedication to work, having real discipline in their work habits, learning how to write well, and learning how to solve complex problems (pp. 9, 11). Out of the fifteen indicators on which the state of American education was judged, nine could be seen as belonging to the area of the hidden curriculum.

Americanization of the new wave of immigrants from the third world is also seen as crucial. It has been estimated that by the year 2000 one in three U.S. citizens will be non-Caucasian (Mirga, 1986), and that between 1980 and 2000 the Hispanic and Asian populations in the U.S. will almost double (Bouvier & Davis, 1982). The concern of business with regard to this significant demographic shift is apparent. L. S. Miller (1986), program officer of the Exxon Education Foundation, has argued that schools should renew their 'nation-building' objective to acculturate these immigrants.

Perhaps the greatest fear of corporate business is the possibility of demise of the capitalist economic system in America. There appear to be several reasons for this. First, there is widespread dissatisfaction in a large section of the American population, especially the disadvantaged, with unequal opportunity, discrimination, and an extremely unequal distribution

of wealth. Economic inequality in the U.S. has been increasing since 1969 while the middle class has been shrinking (F. Levy, 1987). In 1986, when the results of a study commissioned by the Federal Reserve Board on the distribution of wealth in the U.S. were released, statistics included the following: the top 10% families, or 7.5 million households, owned 84% of all wealth; and the top 1% families, or 840 thousand households, owned 50% of all wealth (Cited in R. V. Bullough, 1988, p. 138, note 21). Second, there is currently a radical transformation of global economic realities, a mounting stress on finite energy resources, and a rising popular concern about environmental degradation. Third, there is the precedent of sudden, total collapse of the political and economic systems in Eastern European countries. The 1992 L.A. riots, which spread to other large American cities, were an indication that something similar is not impossible in the U.S. during the coming decades - especially if an increasing number of the population receives no financial or other benefits from the current social-political arrangements. These concerns have been echoed in corporate boardrooms:

After nearly a decade of debate on education reform, far too many American children continue to grow up without the fundamental skills and knowledge needed to be productive in the workplace and informed in the voting booth. The reason is clear: Our society has undergone profound economic and demographic transformations, but the social and educational institutions that prepare children to become capable and responsible adults have failed to keep pace. Unless we act swiftly and decisively...we are jeopardizing America's survival as a free and prosperous society and condemning much of a new generation to lives of poverty and despair (CED, Research and Policy Committee, 1991, p. 1).

William S. Woodside (1988), vice-chairman of CED and chairman of the board of Sky Chefs, Inc., has urged action through education initiatives to alleviate increasing poverty and alienation in American society because it

is poverty that not only threatens gains we have made in public education, it threatens the entire social fabric of our country and the businesses we run (p. 11).

Along these lines, Timpane and McNeill (1991) have suggested to CED that one of the attributes of 'exemplary education-minded business executive[s]' is "[s]ee[ing] their involvement in education as a matter of corporate survival more than social responsibility or community public relations" (p. 34).

Consequently, business has a very specific image of what schools should be. In *The Unfinished Agenda: A New Vision for Child Development and Education*, CED (1991) has expounded that "[b]oth schools and business should do more to encourage students to see learning as preparation for adult work" (p. 57). In doing so, CED rejects the educational model of students as products (the outcome of factory-like schools) or consumers (the right to accept or reject certain types of education). Rather, they view students as "the workers of education; they can enhance their own personal capital by learning more and learning better. In this way they are likely to become more desirable to employers and better prepared to assume the responsibilities of civic life" (p. 56). The worker model of students appears to be better than the product model but only insofar as the range of education offered in schools is fairly wide. The desirable schools of tomorrow, as envisioned by corporate business, have an emphasis on the 'world of work' and are geared toward science, mathematics, and technology and, thus, restricting educational breadth. In this scenario the student model would be more appropriately described as 'not quite in prison, just under home confinement'.

Reform Strategies

If you define America's public school system in corporate terms, what we are trying to change is a corporation with about \$160 billion annual revenue, which is organized into fifty totally autonomous divisions, which are, in turn, organized into 16,000 autonomous or semi-autonomous subsidiaries. Each one of those

16,000 subsidiaries has its own board of directors, its own chief executive officer, and its own labor agreements.

When you look at the scope of that organization and its long history, then no effort to change that culture can be expected to produce results in five years. If you get anything started in five years, you are doing well (Butler, 1988b, p. 4).

Timpane and McNeill (1991) have summarized the evolution of the involvement of business in educational reform during the 1980s as passing through four stages. First, 'helping hand' or partnerships where businesses provide schools with goods and services. Even today it is the most popular kind of business-school relationship - by 1991 approximately 40% or 30,000 of elementary and secondary schools were involved in such a relationship (pp. 9-11). Second, 'programmatic initiatives' where business efforts are concentrated on changing a particular school by setting various programs for youth at risk, management development, and administrative analysis (pp. 12-15). Third, compacts and collaboratives which involve a coalition among business, universities, local government, and communities to change a whole school district (pp. 15-19). Fourth, 'policy change' where business leaders spearhead coalitions to alter the structure and goals of whole school systems (pp. 19-25). These coalitions have been active in almost all states (Fosler, 1990).

During the 1980s the leading role of business in the various commissions and task forces has been seen by business itself as an effective way to shape educational reform compatible with its interests:

In most states, the initiative in setting education policy shifted during the decade from state boards of education, chief state school officers, and educators to governors, legislators, and business interests. New mechanisms for the development of policy have been discovered: special task forces and commissions that emphasize the involvement of business. States have struggled to achieve greater coordination among education, employment, economic development, and social welfare policies (Timpane & McNeill, 1991, p.xi).

The shaping of educational reform has been effected by restricting the educational agenda within the priorities of business:

Business leaders have three roles to play: first, providing the broad strategic thinking that places educational problems in the context of other community economic and social issues; second, providing funds to underwrite initiatives; and third and most important, putting educational problems at the top of the local agenda (CED, Research and Policy Committee, 1991, p. 41).

In *The Business Role in State Education Reform* published by CED, Fosler (1990) describes how business, by building and leading coalitions, can construct a broader constituency that supports educational reform. Part of this strategy involves setting goals, participating actively in the implementation process, and demanding monitoring and assessment of progress. One example in case is the National Commission on Excellence in Educational Administration (1988) which adopted business priorities and methods for a mutually 'beneficial' relationship:

One by-product of this renewed involvement [of business] has been the realization of how much the private sector can help education. This is less a matter of material contribution, more one of expertise and political leverage. The field of school administration would benefit greatly from continued and increased involvement with the private sector. Likewise, schools have knowledge about new populations and effective practices that the private sector would find useful (p. 27).

The Disadvantaged Population Priority

One of the major emphases in the corporate educational agenda is the education of at risk or disadvantaged students. It is one of the major themes permeating all CED publications on education. The phrasing is appealingly humanitarian, laced with indications of self-interest in the matter.

We call for a systematic reappraisal of the way our nation prepares children to become capable adults and urge the development of a comprehensive and coordinated investment strategy for child development and education. Our nation must take on the difficult challenge of ensuring that all children have the opportunity to develop their fullest capacity for citizenship and productive work (CED, Research and Policy Committee, 1991, p. 4).

We believe that it is more important than ever to act on the knowledge that our children are our future. If we fail to nurture and educate all our children, we will be closing the doors of opportunity to a growing number of young people and excluding them from participation in the mainstream of American life. The cost of failure is enormous, for what is at stake is the survival of our free-enterprise economy, our democratic system, and the American Dream itself (CED, Research and Policy Committee, 1991, p. 15).

Owen B. Butler (1988a), chairman of CED, has pleaded with business leaders and educators to use their influence to increase efforts for social services to the disadvantaged so as to maintain the current social and political *status quo*:

Every one of you personally has the power to move us closer to that dream and at the same time to make a world for our children and grandchildren which will be the kind of peaceful and prosperous democracy we all admire (p. 25).

In this effort it is envisaged that the business community should be the major champion of disadvantaged children:

We urge business to become a driving force in the community on behalf of public education and a prime advocate of educational initiatives for disadvantaged youngsters (CED, Research and Policy Committee, 1987, p. 16).

This sense of urgency becomes understandable when placed in a demographic context. CED has estimated that between 30% to 40% (CED, Research and Policy Committee, 1987, p. ix; 1991, pp. 2, 8-11) of all children in the U.S. are currently at risk. It is also anticipated that by the year 2000 minority children will comprise 38% of all children under the age of eighteen (Hodgkinson, 1985, pp. 5-9). If current social trends continue, CED believes that most minority children will be at a disadvantage.

CED has compiled profiles of children who could be classified as being at risk: being poorly prepared or not ready for formal education, having indifferent parents, having teenage parents, being disabled, being culturally different and non-English speaking, being racially and ethnically discriminated against, and being educated in a low-quality environment such as inner city schools (CED, Research and Policy Committee, 1987, p. 8).

Business is aware of the potential adverse effects of the 1980s' reform movement on disadvantaged students:

...the first wave of education reform generally focused on the educational needs of the majority by advocating higher standards....However, many of these proposals created a new dilemma. Higher standards for all without special support for the disadvantaged would inevitably result in higher failure and dropout rates among those who traditionally labor under the greatest handicaps (CED, Research and Policy Committee, 1987, p. 40).

They perceive that leadership from the highest levels of business and education should collaborate with other social and community groups to establish programs that they see as vital for early intervention, restructuring of schools, and retention and entry (CED, Research and Policy Committee, 1987, p. 66). They also suggest that corporate policies "should encourage participation on school boards by qualified corporate leaders and key managers" (p. 78).

In *Children in Need*, CED has put an emphasis on prevention through early intervention:

We call for early and sustained intervention into the lives of at-risk children as the only way to ensure that they embark and stay on the road to successful learning (CED, Research and Policy Committee, 1987, p. 12).

This intervention is seen as a long term process that would follow disadvantaged students from birth to the end of adolescence and might also involve their parents:

We believe that for children in need, we must begin to view the needs of the whole child from prenatal care through adulthood. Such efforts must also involve parents who may themselves be disadvantaged and in need of support services to help them learn how to prepare their children for a better future (CED, Research and Policy Committee, 1987, p. 22).

A coordination of social agencies between state, local governments, and school boards is viewed as necessary for effective intervention and "tailor[ing] programs that meet the special academic, vocational, social, and health needs of disadvantaged children and adolescents" (CED, Research and Policy Committee, 1987, p. 41). CED has compiled a list of such 'successful' early intervention programs that were promoted by business initiatives (CED, Research and Policy Committee, 1991, pp. 71-75).

The role of the federal government is also considered to be important:

Because Chapter I remedial reading and mathematics programs and Head Start programs have had demonstrable success, we urge that federal funding for these programs be brought up to levels sufficient to reach all eligible children. Moreover, continuous assessment and tracking of data are needed to assure that reforms and special programs, such as Chapter I and Head Start, operate effectively. This is best accomplished at the national level; therefore it is more important than ever for the federal government to fund high-quality research, development, evaluation, and technical assistance for Chapter I, Head Start, and related programs. Educational researchers need to develop a new generation of compensatory education models, and school districts sorely need hands-on technical assistance from those who know how to implement and evaluate currently effective models and those that are emerging (CED, Research and Policy Committee, 1987, p. 18).

All the humanitarian proverbialism about helping disadvantaged students may be an indication of genuine concern by corporate business leaders. Nevertheless, the rhetoric is in many ways similar to the business and professional utterances of the nineteenth century about 'helping' needy children of the time. The establishment of social agencies and reform schools back then had largely harmful effects on children because they were used more for social control rather

than help (see Chapter 3). In addition, the proposals for following up disadvantaged students, and perhaps their parents too, from birth to adulthood pose enormous questions of intrusion into the lives of disadvantaged families. While business keeps emphasizing the importance of family in the socialization of children, the proposed strategies and programs (e.g. CED, Research and Policy Committee, 1991, pp. 16-38) may have the effect of undermining it even further. It has to be questioned whether placing the whole range of child development within a formalized institutional complex will be beneficial to disadvantaged children. The benefits to corporate business, from a social control perspective, are apparent, but not so for these children and their families.

View of Business Impact

An examination of the school reform agenda of the 1980s and the educational agenda of the business community makes it quite apparent that there is a close match between the two: strong link of economic and competitiveness issues with schools, performance-based goals, higher academic standards and promotion of high-ability students, incentives and accountability, teacher education reform, and emphasis on disadvantaged students. In the words of Timpane and McNeill (1991) the "education policy developments of the 1980s have strongly reflected the interest of business in education reform" (p. x). Perhaps the most important factor has been a wide network of connections:

CED has been extraordinarily effective in disseminating its ideas and perspectives....A thorough media campaign stimulated several hundred articles and editorials, not simply reporting but embracing the CED perspective with scarcely a critical word (Timpane & McNeill, 1991, p. 6).

Some of the reforms at the state level have reflected these interests: almost all states have statewide student testing; forty-three states have raised their graduation requirements; and twenty states have or are deliberating legislation to allow for public school choice (CED, Research and Policy Committee, 1991, p. 66).

In 1989 U.S. national business organizations formed the Business Coalition for Education Reform (Toch, 1991, p. 22). This was partly to dissatisfaction with the pace of reforms. As Cuban (1992) put it by "the late 1980s, business leaders continued to play the philanthropic and supportive roles, but increasingly harsher tones were emanating from corporate boardrooms" (p. 157). Louis V. Gerstner, Jr., chief executive officer of RJR Nabisco, was quoted by Finn (1991) as saying on March 23, 1990:

Blow up the current public education system. The system doesn't work. No more tinkering at the margins. We need to create fundamentally new learning environments....Traditional approaches simply won't work anymore (p. 52).

Timpane and McNeill (1991) have concluded that despite strides the results in schools have been poor and that there is mutual distrust between educators and business (pp. 28-31). They think that "education reform will undoubtedly struggle in the decade ahead to retain the momentum so recently achieved, and the strength and durability of business support will be sorely tested" (p. 7), but they have recommended to CED and other business organizations to show an attitude of "controlled impatience" (p. 37).

'How to Write your Own Report'

The release of the *A Nation at Risk* report was followed by a plethora of other reports on the state of American formal education and the 'needed' reforms. It is important to recognize that

the source of most of these reports was the business community and more specifically large corporations. Commissions were dominated by chief executive officers of major corporations and began to release reports that by and large expressed the corporate point of view for reforming public schools. Successful businesses have operated upon principles of clearly articulated goals and standards, decentralized operation, accountability, reward or punishment of employees based on performance, and attraction of larger market shares. Translated into school reform language these principles were: clear national educational goals and standards, local school control, national examinations, school reward or sanctions on the basis of performance on national examinations, and attraction of more students or bankruptcy. By 1990 more than 300 such reports enunciating this model had appeared (Cuban, 1992).

The criticisms and recommendations of these reports were so similar that Alex Heard (1985) wrote a satirical column in the *New Republic* on November 7, 1983 entitled 'How to Write your Own Report'. He parodied the style and the content of the reports and suggested that since reports are released at such a pace anyone might write their own. With regard to attention grabbing phrases he recommended something along these lines:

Jesus Christ! We need help!
Look into my face. My name is Might-Have-Been. I am also known as No More,
Too Late, Farewell, and the Dream of American Educational Excellence (p. 119)

With respect to memorable images and metaphors:

Were our education system sent home with the report card it deserves, it might well be spanked by angry parents (p. 120).

Our education system is like a high school football team down 6 to 0 deep in its own territory with no time-outs and an injured 1st-string QB. If an unfriendly rival tried to impose our education system on us, we would be tempted to steal that team's mascot (p. 120).

In reference to recommendations for reform:

I hear you asking, "But won't I need lengthy, detailed policy recommendations? Sure....just remember the key word more: more math, more science, more reading, more homework, more discipline, more principals who are more strong, more school hours, more "computer literacy"..., more "quality instructional time," more "time-on-task," more "in-service training," more teachers, more qualified teachers with more training who won't need additional training "on-site," and (you can't use this one too often) more excellence (p. 119).

With regard to pork-barreling:

Recommend that, as a first step in "implementing" your proposals, the members of your study group must break up into smaller groups, each assigned to conduct a longitudinal (that is, permanent) assessment of the problem. Needless to say, each group will need seed money, and after that, funding (pp. 120-121).

Alex Heard's parody could not have been more on target. In fact he has concurred, albeit in a humorist's language, with some of the major criticisms of the 'excellence' reports and movement.

Criticisms of the 1980s' Reforms

As the 1980s decade was drawing to its end, an increasing number of educators and academics started to come to the conclusion that the reform movement was failing in achieving its stated objective of quality education for all students in American schools. There was a consensus across the ideological spectrum from conservative (e.g. Finn, 1991), liberal (e.g. Bracey, 1992) to radical critics (e.g. Apple, 1990) that the American education system had not succeeded in reforming itself for the benefit of all of its students. Radical critics (e.g. Popkewitz, 1991) not only perceived a stalemate but a worsening of the situation in terms of a restricted educational agenda laying, to some degree, the foundations for corporate and state social control compatible with the emerging social and economic realities.

Conservative and Liberal Criticisms

On September 22, 1983, Graham Down (1985), Urbane President of the Council for Basic Education, delivered a speech to the National Press Club in Washington DC. He gave a scathing critique of the first major national reports which had been released by then:

These reports, with their numbing similarity to all the reports generated by high-level education commissions over the last thirty years, may have already become an inadvertent impediment to educational improvement (p. 273).

And he went on to explain why:

I call on this audience not to be deluded by the latest explosion of ardor and earnest talk. The enemies of excellence are legion and well entrenched. I will focus...on three killers of excellence, any one of which could murder educational reform and escape without being seen.

The first of these killers is a destructive inequality in society's commitment to educating students from different social and economic classes. A Marxist would call it class warfare. I prefer to call it malignant disparity under the guise of equality....

.....
The second killer of excellence is the rampant misuse of minimum competency testing. The third is misguided utilitarianism (pp. 275).

Almost a decade later Thomas Toch (1991) echoed Down's pessimistic appraisal by expressing the view that "educational excellence remains a scarce commodity" (p. 4).

The Economic Focus of the Reports

Powerful social groups in American society have always criticized public schools. According to Jaeger (1992) "[s]chool bashing enjoys a long and rich tradition in this country. It appeals to the public, it grabs attention, and it doesn't cost anything" (p. 124). More than anything else, it is probably a 'here and now' attitude on the part of the American public and

professionals that is responsible for an inability to gear meaningfully educational reform. This ahistoricity may be perilous, as Kenneth A. Tye (1992) has pointed out:

Americans are dangerously ahistorical. That is partly a result of a distorted pragmatic outlook - i.e., ask only if it works; don't ask why. This ahistorical attitude, played to its fullest, allows people to ignore the major social factors that have caused our schools to be as they are. Unfortunately, such ignorance also allows people to be duped by those who propose simple solutions to complex problems. In a sense, this is where we are today (p. 12).

Cautious voices about the various national reports and commissions did exist in the 1980s. Philip Altbach (1985), for example, took a historical perspective and tied the reforms to the National Defense Education Act of the late 1950s and other postwar developments. He insisted that, in the past, social problems not created by schools were not resolved when placed in a school context. Similarly, he argued, most of the problems tied to education in the national reports were not originated in schools and cannot be solved by them. Taking note of the overwhelming influence of the business sector in the formulation of educational priorities, he urged prudence:

Excellence sounds like a good thing, and there is universal agreement that the schools do need some added attention and, perhaps some significant changes. But the very unity of views of the current reformers should give us pause. Once we look carefully at where the recommendations are coming from as well as their content, it is clear a critical assessment is necessary (p. 27).

The main purpose of the reports, according to Kelly (1985) was to change the focus of educational policy from issues of social justice to the economy, national defense, and the government's role in education.

Brown and Comola (1991), even though supporting the view that education has a large role in the economy, have, to a large extent, attributed declining economic productivity and competitiveness to problematic business organization (pp. 59-74), inadequate emphasis on quality production (pp. 75-82), and power corruption at the uppermost levels of corporations (pp. 93-

110). Many others, have criticized the connection of declining U.S. economic competitiveness and productivity to educational problems as inaccurate and misleading:

...it is doubtful that...educational policies will help the United States be more competitive with its capitalist rivals. The automobile industry is in trouble because the Big Three companies wanted to make more profits building big gas-guzzling cars....The steel industry is in trouble because it refused to invest in advanced technology, preferring to wring as much it could out of antiquated plants. Neither of these problems has anything to do with the falling SAT scores or supposedly excessive civil-rights legislation (Pincus, 1985, p. 343).

American economic competitiveness with Japan and other nations is to a considerable degree a function of monetary, trade, and industrial policy, and of decisions made by the President and Congress, the Federal Reserve Board, and the federal departments of the Treasury and Commerce and Labor.

Therefore, to contend that problems of international competitiveness can be solved by educational reform, especially educational reform defined solely as school reform, is not merely Utopian and millennialist, it is at best foolish and at worst a crass effort to direct attention away from those truly responsible for doing something about competitiveness and to lay the burden on the schools. It is a device that has been used repeatedly in the history of American education (Cremin, 1989, p. 103).

Larry Cuban (1992) in 'The Corporate Myth of Reforming Public Schools' has challenged the connection between education and the economy for several reasons. First, worker productivity depends on several sources. Second, the link between failing test scores and declining productivity is largely erroneous. Third, there is no consensus among economists on the impact of schools on the American economy. Instead, he has attributed economic woes to globalization. transfer of industrial plants from the U.S. to countries with cheaper labor, corporate mismanagement and greed, and the growth of the service sector and a shrinking manufacturing sector. Bracey (1992) has interestingly noted that countries where the plants have been moved have less skilled workers. Even more interesting is the fact that when the reports were bombarding the public about the need for highly skilled workers, the Department of Labor

statistics were indicating that the vast majority of newly-created jobs needed few skills. Svi Shapiro (1985), commenting on this contradiction, suggested that the real objectives of the reforms were "to ensure...[the workers'] uncritical obedience to the corporate chain of command" (p. 368).

The corporate model of educational reform has been criticized for being inappropriate because "it is dangerous to borrow the methods of improving business and to graft them onto the public schools....[T]ruth-in-advertising requires that the operation be called what it is: an experiment on children that has no scientific basis" (Cuban, 1992, p. 159). R. V. Bullough (1988) has termed the corporate model the 'economic marathon' metaphor where all students are obliged to run a tough academic course. A few students will finish to "carry our banner into the economic wars of the future" (p. 127). He criticizes such a view of education as "twisted and misshapen" (p. 129) and as neglecting common interests to cater to special interests (p. 125). Instead, he offers as an alternative the 'community' metaphor where open disagreement is viewed as a normal and necessary part of informed dialogue among community members who alone decide the educational fate of their children (p. 135).

Investing in Militarization

Another issue that seems to have attracted little attention is the significant degree to which the American economy has been geared toward the manufacturing of military products and knowledge. According to Brown and Comola (1991) approximately 30% of all engineers and scientists in the U.S. have been employed by military industries. In addition, the total military expenditure of the last ten to fifteen years has been in the order of \$3 trillion. Most of the

research and development budget has been expended on testing and evaluating military equipment: only \$0.9 billion was allocated to basic research and \$2.4 billion in exploratory development (p. 68).

The significance of these facts cannot be overstated. An enormous amount of fiscal and human resources has been spent for the development of products and skills which cannot be easily used in any other sector of the economy. The diversion of resources of that magnitude has certainly had an aversive impact on the American economy (which will probably become more obvious in the next few decades as the ensuing deficit will have to be paid off), the use of brainpower, education and social services, and the direction of the American political system.

Public Consensus

The seeking of public consensus has always been crucial in the acceptance of any social policy and its subsequent implementation. Even though a thorough campaign through commissioned reports and the media was conducted, the consensus was of superficial nature and when it came down to implementation the diverging points of view of different social groups became apparent. Many education professional organizations did not welcome the reforms and remained either indifferent, defensive, or hostile (Finn, 1991, pp. 52-69; Toch, 1991, pp. 29-33). Toch (1991) has blamed teacher unionism for much of the resistance, and Finn (1991) has argued for constructing a broader consensus through a "four-front war" (p. 293). This 'war' would involve the establishment of clear objectives in schools (pp. 297-300), the values cherished and transmitted by American culture to its youth (pp. 300-303), the termination of remedial courses

in higher education and differential treatment of graduates by employers (pp. 303-306), and a coordination between school and other social agencies (pp. 306-311).

The *A Nation at Risk* report gave the illusion that substantial consensus in breadth and depth existed among educators. Those who disagreed were summarily treated in a single paragraph, the only indication in the report that some people had concerns about the framework of reform:

Some worry that schools may emphasize such rudiments as reading and computation at the expense of other essential skills such as comprehension, analysis, solving problems, and drawing conclusions. Still others are concerned that an over-emphasis on technical and occupational skills will leave little time for studying the arts and humanities that so enrich daily life, help maintain civility, and develop a sense of community. Knowledge of the humanities, they maintain, must be harnessed to science and technology if the latter are to remain creative and humane, just as the humanities need to be informed by science and technology if they are to remain relevant to the human condition (National Commission on Excellence in Education, 1983, pp. 10-11).

Stedman and Smith (1985) after examining four of the initial reports (*A Nation at Risk*; *Action for Excellence*; *Academic Preparation for College*; and *Making the Grade*) concluded that their major objective was to manipulate public opinion:

[I]t should be recognized that these reports are political documents; the case they make takes the form of a polemic, not a reasoned treatise. Rather than carefully marshaling facts to prove their case, they present a litany of charges without examining the veracity of their evidence or its sources. By presenting their material starkly, and often eloquently, the commissions hoped to jar the public into action, and to a great extent they have been successful (p. 84).

According to Bracey (1992) members of the Reagan and Bush administrations (1980-1992) used a similar 'polemic' strategy to intimidate into silence education researchers whose research findings or opinion diverged from the official policies. Chester Finn (1988), a participant in these

intimidation tactics, has termed it the 'bully pulpit agenda' for "shaping, catalyzing, legitimizing, and reinforcing the inclinations of reform-minded individuals across the country" (p. 349).

Centralizing Decision Making

Decentralization of the education system has been one of the much publicized objectives of the reforms. Mary Anne Raywid (1985), however, predicted in 1984 that the reform proposals would have exactly the opposite effect. Seven years later Toch (1991) has pointed out that the "myriad mandates spawned by the reform movement have reduced the authority of teachers, principals, and local administrators in many areas of school life, from length of classes to content of courses" (p. 39). The enactment of laws, the setting of certification requirements, and the multiplicity of rules and regulations, which were initiated primarily outside the education community, have had the effect of imposed, top-down change and centralization (pp. 38-39).

Indeed, various laws and regulations of very similar nature in all states along with calls for national standards and nation-wide testing appear to be contradictory with rhetoric about decentralization and 'schools of choice'. Tye (1992) has observed similar educational trends in other countries such as Australia, England, Wales, and New Zealand. He states that governments have resolved the contradiction by tightly controlling objectives and priorities in schools, that is ideological control, while passing the responsibility of everyday difficult issues to local schools. In other words, governments control the 'what' of education while localities are left to decide the 'how'. In controlling the 'what', governments have the capability to define and restrict the educational agenda whereas localities can only decide, within these limits, on the 'how'. This amounts to centralization of decision making as the 'what' can drive to a large extent the 'how'.

The imposition of reforms and centralization has had, according to Toch (1991), several unintended outcomes. Teachers and students have been further demoralized into a state of apathy (p. 4). Standardized testing as a means of student, teacher, and school accountability has had the effect of reinforcing the type of learning that stated reform objectives have been trying to eradicate (pp. 205-232). Academic courses have been watered down, teachers have failed to find or implement new pedagogical methods to teach disadvantaged students, and tracking remains as pervasive a practice as ever (pp. 99-133). D. Carlson (1985) had predicted at the outset that the most likely outcomes of reform proposals would be a further distancing from complex forms of literacy, critical thinking, and teacher professionalization.

Implications for Disadvantaged Students

All these indications do not seem to give an encouraging picture of the reform impact with regard to disadvantaged students. Some reform-minded educators (Allen, 1992, p. 19; Toch, 1991, p. 272) have suggested that 'excellence' and equality in education have to become compatible somehow. Toch has stressed the addition of a 'human element' to counter "alienation and apathy" in schools (p. 271-272). In *Schools for a New Century*, Allen (1992) has proposed a national experimental school network encompassing a number of elementary and secondary schools and teacher preparation programs to promote programmatic educational change. Others have recommended "provisions for additional help" for at risk students (McDill, Natriello, & Pallas, 1986). Some others have depicted the state as having usurped the powers of parental authority with respect to education at the expense of the children and have suggested that it be given back (Waters, 1991). Still others have maintained that deteriorating social conditions in

which disadvantaged students and their families live have to be addressed if schooling is going to have any positive effects (Bracey, 1992; Jaeger, 1992).

Radical Criticisms

The term 'radical' is used here for lack of a more appropriate word. Some of its connotations include 'extreme', 'fanatical', or 'militant', but others signify 'fundamental' and 'basic'. It is within the latter semantic context that the term 'radical' is used here. Chester Finn (1991), a neoconservative, has called radical criticisms of American education and of the 1980s' reforms as "[b]ad ideas whose time has come" (p. 203) - an understandably polemic appraisal since they tend to focus analysis on the heart of the phenomenon under examination and its link to wider social issues. For this very reason, many radical analyses represent in-depth examinations of schools and education phenomena by asking questions such as 'What knowledge is considered to be valuable in schools and society?', and 'Says who and why?'. These inquiries have the advantage of getting to the source(s) of the problem by finding answers as to who yields relatively more power than others in schools and society and thereby being able to set, to a considerable degree and according to their interests, the educational agenda. This section is based on two traditions of thought: structural and poststructural perspectives. The former tends to conceive of power as deriving from the way American education is structured and the latter as stemming from the interaction of the various participating social groups. These two positions are viewed as complementary rather than contradictory.

During the 1980s the conservative and liberal education agendas intersected to a large extent in the ways and means of producing reform but they pursued quite different ends. While

agreeing on the importance of education to the American economy the former pursued the goals of market-economy values, religious messages, American culture, and nationalism-patriotism. The latter pursued the aims of autonomy, creativity, tolerance, and critical reasoning (Popkewitz, 1991, pp. 113-116). It was not long before, however, that liberal ideas and practices came under concerted attack by conservative critics (Apple, 1988).

Engineering Consensus

Radical critics have contended that American schools badly need reform. They believe, nevertheless, that the 1980s' reforms have been based on superficial analyses, narrow interests, and restricted vision. Popkewitz (1991) has castigated the various national reports by saying that in "place of analysis, these reports offer exhortation and prophecy" (p. 149). The Committee of Correspondence (1985), a consortium of organizations in the U.S. and U.K. for educational change, has further elaborated this point:

Our schools must be reformed. But the more reasonable voices are being drowned by a deluge of deceptive slogans and simplistic prescriptions that threaten popular democracy, and the commitment and dignity of each individual....Their effect will be to narrow the curriculum; constrain initiatives by teachers, principals, and communities; provide more educational benefits to the more privileged; and devalue genuine learning and intellectual attainment.

These solutions are a threat to excellence, not a step towards it (pp. 374-375).

Similar views were expressed by Rossides (1985):

The current debate about education is worthless because the goals of education are stated in empty abstractions....The current debate is worthless because the power of education is vastly exaggerated. The current debate is worthless because the debators are unaware of the real purposes of education. The current debate is worthless because all mistakenly assume that poor schools can be improved from within the educational system...And nothing can be done until we acknowledge the huge state and federal educational subsidies that we give to the

middle and upper classes who attend colleges and universities while denying needed funds for schools lunches and reading materials for the lower classes (pp. 369-370).

What appears to have underlined all the reports of the 1980s was the assumption that a general consensus among the American population existed with respect to moral, intellectual, academic, and other social issues. According to Popkewitz (1991), no such consensus existed and it was the objective of all these reports to create it either substantially or superficially by ignoring conflicting sets of values held by different social groups (pp. 148-149). The various commissions did not even hesitate to base their conclusions and recommendations on "questionable research and outdated data" because they were "instruments of persuasion, tools in the rhetorical exchange in which power relations and status in society are established" (p. 158).

Radical critics maintain that the educational reforms of the 1980s have predominately catered to special interests rather than the interests of the wider American population. Demographic, cultural, economic, political, and other social trends have influenced the educational agenda (Popkewitz, 1991, pp. 110-135). Joel Spring (1985), after reviewing the first major national reports released in the early 1980s, came to the conclusion that they primarily served the political interests of the incumbent president and the governors and the economic and social interests of major corporations. He pointed out that the end result would be an increasing division of American society along class lines, narrowed democracy, and no noticeable improvement in the working conditions of teachers except increased pay.

The Corporate Model

The predominance of the corporate model of educational reform has been severely criticized. First, the various reports on education, and especially the *A Nation at Risk* report, have been seen as instruments of shifting responsibility for decreasing productivity from inadequate business management to the public schools (Spring, 1985). Second, the imposition of business perspectives on school reform is largely regarded as detrimental. The involvement of business leaders is seen within the historical context of their continuous involvement in educational matters since the 19th century. This involvement has always become intensified during periods of perceived crises and general sociopolitical changes to ensure the maintenance and promotion of business interests (Popkewitz, 1991, p. 129). As pointed out by Raymond Callahan (1962) thirty years ago in *Education and the Cult of Efficiency*, school administrators have fallaciously adopted business values and practices. He criticized this adoption on the basis that education is not a business and schools are not factories. In combination with a lack of historical knowledge of the trends that shaped public education, he related how school personnel are easily deceived by misleading reform rhetoric.

The more recent attempts to realign educational leadership on the corporate model is seen as naive and problematic.

The current infatuation with the market can be seen in the support by mainstream educators and politicians of the view that leadership is to be modeled on the style and ideology of leading corporate executives....

..... This view of educational leadership is paradoxical. Not only does it ignore the language of community, solidarity, and the public good; it also draws unproblematically upon a sector of society that has given the American public the savings and loan scandals, the age of corporate buyouts, the proliferation of "junk" bonds, insider trading, and the large increase in white-collar crime. It has also produced multinational corporate mergers that eliminate jobs and violate the public trust, and it has made leadership synonymous

with the logic of the bottom line, self-interests, and corporate avarice (Giroux, 1992, pp. 6-7).

Similar concerns about the overall business involvement and function of public schools have been expressed by Michael W. Apple (1990):

I cannot accept a society in which more than one out of every five children is born in poverty, a condition that is worsening every day. Nor can I accept as legitimate a definition of education in which our task is to prepare students to function easily in the "business" of that society. A nation is not a firm. A school is not part of that firm, efficiently churning out the "human capital" required to run it. We do damage to our very sense of the common good to even think of the human drama of education in these terms. It is demeaning to teachers and creates a schooling process that remains unconnected to the lives of so many children (p. xiv).

The cooperative links between business and schools serve two main purposes, according to Spring (1985). First, to make sure that high-ability students are trained to fulfil the needs of corporations in scientific and technological occupations. Second, to ensure that lower ability students are socialized in a manner that serves and does not undermine the needs and interests of corporations. It has been pointed out that the predominance of business views in education reforms in many countries around the world is not incidental and that the U.S. has played a leadership role in this respect (Apple, 1990, p. vii).

The Hidden Intention: Social Control

The education reforms had inherent elements of social control as a continuation of government efforts since World War II (Popkewitz, 1991, pp. 137-165). The stresses put on traditional mechanisms of the political and education systems by a changing economy, militarization, the counterculture of the 1960s, the civil rights movement, and a popular opposition to the Viet Nam war have resulted in a renewed drive by the federal government to

further centralize educational control (pp. 106-109). This was done by using the interconnected themes of professionalization, motivation of the work force, spiritual betterment to correct moral failure in contemporary American society, renewed nationalism, cultural homogeneity, social harmony and consensus, reaffirmation of capitalist values (Popkewitz, 1991, pp. 146-148), economic modernization, and populist politics (Apple, 1988).

The federal government increased its participation in education not by enlarging its legal powers but by setting national standards and monitoring procedures (Popkewitz, 1991, pp. 116-117, 136-165) a process that has been termed 'steering' (p. 117). The responsibility for executing the steering and monitoring directives has been delegated to the state governments (pp. 120-125). It is in this sense that the federal government has claimed that its initiatives will lead to deregulation or decentralization. According to Popkewitz (1991), however, "the new circumstances involve neither deregulation nor decentralization in that various forms of school steering occur in multiple institutions and at various layers, rather than as a homogeneous, single outcome" (p. 123). The result has been centralization of educational policy through the restriction of educational discourse.

Henry A. Giroux (1992) has stated that there has been "a disturbing implication in current reform agendas in the United States that as a society we have demanded not too little, but too much of democracy" (p. 6). At the same time that loud proclamations of citizen participation have been made by federal and state governments, a plethora of restrictions have been placed on the decision making maneuverability of citizens in almost all institutions (Apple, 1988). Their participation is not about setting the wider objectives of institutions. It is about how predefined goals will be efficiently implemented, the agenda has already been fixed:

[T]here has been a narrowing of democracy. This narrowing has occurred even though the reform discourses express a rhetoric of professionalization and empowerment. The rhetoric of reform is intended to increase people's involvement in decisions at all layers of institutional life, but those decisions occur in a range of practices that are increasingly restricted. Participation is about technical solutions, efficiency, and functional approaches (Popkewitz, 1991, p. 245).

Decontextualizing Educational Issues and Problems

Apart from centralization, another outcome has been the decontextualization of educational reforms from their historical evolution (Popkewitz, 1991, pp. 133-135, 136-165). 'Critical thinking', 'problem solving', and 'teacher professionalization or empowerment' are phrases that have been used in many educational reports and teacher education programs sponsored by various foundations and business groups. These terms "have universal appeal and can support a wide array of assumptions formulated in response to contradictory interests" (p. 128). The reform proposals and most of the research that has been generated by them have tended to focus on the process of 'critical thinking', 'problem solving', and 'teacher professionalization' ignoring or not defining the substance of what it is that should be thought, solved, or professionalized (pp. 156-157). Teacher thinking especially has been at the center of research spawned by reform proposals (pp. 166-189).

A brief look at this area of research (e.g. Clark & Peterson, 1986; Lieberman, 1988; Shulman, 1986, 1987; Shulman & Sykes, 1986) makes obvious that teacher flexibility, individuality, and critical thinking are severed from their social construction and become issues of administrative practice and control. Educational researchers operate within a framework that has fastened educational research to objectives provided by the state - science, technology, and

economic advancement. Education functions under the illusion that a relatively stable consensus exists, though talking with citizens on the street is quite convincing of the opposite.

This way of seeing teacher thinking, according to Popkewitz (1991), "is appropriate for middle-level bureaucracy and business; critical thinking does not mean creating questions that are systemic or historical" (p. 196). Consequently, current research on teacher thinking may be detrimental to teacher practice by constraining teachers and students within a narrow range of "thought, perception, feeling, and practice" (p. 187), by further dehumanizing and disconnecting the school world from the community to which it should belong, by indoctrinating students and teachers in the social order on which the teacher model is based, and by confining teacher practice within the steering intentions of the U.S. federal government (pp. 187-189).

In this light, Popkewitz (1991) views the role of universities and schools of education as rather complacent. Particular issue is taken with the Holmes Group for "accept[ing] myths of professionalism without considering the historical process by which professions gained and consolidated power, as well as the tendency since the late 19th century for the reforms of teaching to introduce hierarchical forms of control over a corps of mostly women teachers" (p. 133). By accepting the decontextualization of the reforms the Holmes Group has served to legitimate the myth that they are objective. The reform proposals of the 1980s are not objective simply because all reform proposals serve the interests of certain groups - the ideal society would be one where almost all social groups' needs are addressed. The social significance of the 1980s' reforms will probably be realized more fully in the next few years and decades.

The decontextualization of the reforms and the subsequent research could not be more evident in the delinking of social and school problems. Social problems such as poverty,

inequality, discrimination, inequitable distribution of wealth are all closely connected to school problems. "Instead of addressing how these issues impact upon schools and undermine how children learn, America 2000", says Giroux (1992) referring to Bush's preelection education platform, "focuses on issues such as testing and choice" (p. 6). The reforms of the 1980s, which appear to remain in fashion in the 1990s, are permeated by 'possessive individualism': the belief that all individuals have the capability of learning but without factoring in the inequitable social conditions that preclude a large part of American society from educational opportunity (Popkewitz, 1991, pp. 150-154). Referring to a number of other social problems, Rossides (1985) had predicted in 1984:

More science and mathematics will be taught but little will be said about the purposes of science or the threat to the environment posed by technology. Little will be said about the failure of economics to provide a better way to handle our economy. No realistic analysis of our stalemated political system will be forthcoming (p. 372).

Effect on Disadvantaged Students

Within this framework what is the likely impact on disadvantaged students? One given is that systems of classification for educational amelioration are likely to be sustained rather than scrapped. Another given is the recognition of a large part of the American student population as being 'at risk'. It would not be unlikely, given the persistence and frequency with which disadvantaged students are mentioned in educational literature the last few years, that they may be the target of special educators and other social agencies for 'help'. It remains questionable whether this targeting will prove to be beneficial to the disadvantaged population.

Labeling poses the advantage to those who suggest or do the labeling of proposing methods of 'help' and 'remediation'. Thus, it offers the potential power for "manipulation and control" (Apple, 1990, pp. 138-142). The whole issue of amelioration as it relates to the disadvantaged could not be presented more incisively than the way Popkewitz (1991) has put it:

Officially set categories make it possible to assist groups through mechanisms channeling demands into language and practices that recontextualize and reformulate the issues....[T]he fight by blacks, Hispanics, and other "minorities" for proper acknowledgment of their children's educational plight and for better funding for their schools is produced within processes that normalize their struggle into systems of remediation. These systems introduce new forms of observation, supervision, and control. These implications of the regulations are obscured, since the issues of learning, teaching, success, or failure appear as procedural problems rather than social issues (p. 198).

The pervasive, ameliorative mentality in American education makes it quite likely that traditional remediation processes will combine to target a part of the American student population, the disadvantaged, which is three to four times larger than the current official exceptional student population.

Emerging Themes

The following themes have emerged in this section: social control, engineering consensus, corporate model, contradictions of the reform movement, the disadvantaged priority, use of social science by the state and corporate business, and implications of reforms for disadvantaged students.

The educational reforms of the 1980s have to be seen in the context of the social-political shift to conservatism after the tumultuous 1960s and 1970s and as the result of the coalition between neoconservative and New Right groups. Accusations that the focus of American

education during the 1960s and 1970s on equality and civil right issues was responsible for its inadequate state are quite inaccurate; this was an original addition to the panoply of 'school bashing', a frequent phenomenon in U.S. history. Rather, it is a combination of excessive utilitarianism, prejudice, and tracking practices that has been responsible for the evolution to its current state. Further, the reforms have to be seen as a continuation of efforts by the federal government and business groups since the end of World War II to adapt the patterns of social control to changing social, economic, political, and demographic circumstances. Most, if not all, of the stated objectives of the 1980s' reforms have met with failure. The hidden or invisible objectives of laying the foundations for renewed social control, however, have been met with considerable success, resulting in a narrowed democracy.

A plethora of reports on the state of American education was released baring a make-up of common themes and similarities: economic productivity and competitiveness as depending on schooling, higher academic standards and quality, student and school accountability, equity and the disadvantaged, civic responsibilities of citizens, survival of American democracy and nationalism, lack of clearly defined education objectives, focus on science, mathematics and technology, and teacher professionalism.

The overwhelming number of reports and their similarity had the effect of drowning voices with dissenting opinions and gave the impression that a consensus existed across all layers of American society regarding educational reform. Chester Finn (1985), one of the major participants in the 1980s reforms, placed an emphasis on consensus in several of his writings. One of these writings had the revealing title 'The Drive for Excellence: Moving Towards a Public Consensus'. A well-organized media campaign by the federal government and business

organizations ensured the dissemination of the content of the reports. The relative ahistoricity of the American public and professional educators quite probably played an important role in the complacent acceptance of the conclusions and priorities set forth. The hidden intentions of the reports were fourfold: to engineer consensus, shift the blame for economic decline from business management decisions to the state of public schools, reopen discussion on the roles of government and business in education, and refocus educational issues from the social problems of justice and equality to the economy.

By far, the corporate-business view dominated reforms. Most of the reports were sponsored by business organizations, foundations with close ties to business, or federal and state government agencies and task forces. In all these reports, business leaders of the highest level commanded an impressive presence as commission members. Business leaders also spearheaded coalitions for educational reform in almost all states and took the initiative in establishing and promoting tens of thousands of school-business partnerships. The outcome of close matching between educational priorities set by corporate business (especially as represented by CED) and actual reforms, then, comes as no surprise. Preparing students for the coming world of work became the predominant model. The involvement of the business community may be seen as an effort to update the factory model of schools to the corporate model as a more compatible school form for current social and economic realities. Perhaps the single most notable factor for involvement was the perceived threat to corporate interests and the survival of American capitalism. Closely tied to this threat is the substantial growth of the population considered at risk, 30% to 40% of all children, to which the business community aspires to become the prime advocate. It is quite perplexing as to how corporate business, which should be lacking public

credibility because of its numerous gigantic financial and other scandals during the 1980s, has managed to present itself as the major advocate of the disadvantaged and school reform.

A number of contradictions are evident in the reform movement of the 1980s. First, humanitarian verbosity and the declared commitment to equity was inconsistent with the nature of the reforms and their results. It is interesting to note the reaction of many educators to the notion of equity. Toch (1991), for example, thought that it was a very positive development:

Only after the conscience of the nation had been transformed by the crucible of civil rights were the full implications of universal academic secondary education able to be considered. Its shortcomings notwithstanding, the equity movement permanently altered the moral landscape in American education, establishing the widest possible participation in the educational mainstream as a national priority. In this changed environment, the school reformers' calls for educational excellence in the 1980s implied much more than did similar exhortations in earlier eras: for the first time, the full range of students served by the nation's public secondary schools were included in the excellence equation (p. 71).

While proclaiming equity, many of the reforms had as objective the promotion of the best students through competitive practices. Elitism became an openly legitimate function of public schools while equity rhetoric was pronounced.

Second, the proclamation of general academic education as a major objective of the reforms was in direct conflict with reform implementations. Again, rhetoric asserted the priority of general academic education when reforms sought to tie schools to the world of work, to science, mathematics, and technology. Further utilitarianism and vocationalization was one of the outcomes, not enlarged opportunities for general academic education.

Third, while espousing the restriction of the number of objectives in public schools, reformers advocated and are still advocating the intervention of schools in collaboration with other social agencies in the lives of students, especially disadvantaged students, to ensure 'success

in learning'. This case represents an additional objective for public education. Other traditional objectives have not been substantially altered by ongoing reforms. On the contrary, there has been a magnification of the view of schools as what has been termed 'redemptive institutions' (Popkewitz, 1991, p. 160), the place where the U.S. will fulfil or abrogate its destiny. Outgoing president George Bush (1992) in the election feature of *Phi Delta Kappan* strongly made the point that if "we want to change the country, we have got to change the schools" (p. 130). Popkewitz (1991) has aptly summarized this vision:

While the school has long been viewed as an essential element in the millennial vision of the United States...current proposals give further credence to the notion of schools as redemptive institutions. The goodness, sanctity, and progress of American life is now seen as tied to the process of schooling. The language of reform often has particular U.S. Protestant character: The concerted good works in schools are to establish those conditions and spiritual values that can shape a heaven-on-earth. The dreams of democracy, material abundance, and spiritual contentment - visions that underpin the nation's belief in itself - depend on the success and progress of schooling (p. 148).

Fourth, the use of standardized testing, as an accountability measure, has had the effect of promoting mechanical literacy, in contrast to the reform proclamations for critical thinking and literacy. What has ensued, in fact, is a further distancing from pedagogies which attempt to promote complex forms of thought and the ability to analyze information critically.

Fifth, the rhetoric of decentralization of decision making has completely diverted educators from the fact that there has been a significant degree of centralization. The federal government has acquired the role of 'steering' the educational agenda, without increasing its legal power, while the state governments carry out the directives and priorities set by the former. The uniformity of legislation and regulations across states as a consequence of the 1980s' reforms

testifies to the extent of this centralization trend. The claims of bottom-up change have been contradicted in reality by top-down reform.

Sixth, there has been support for the idea that the family as a social unit should be strengthened. The currently progressing arrangements of school collaboration with social agencies for intervention in the families of disadvantaged students (e.g. Bruner, 1991; Melaville & Blank, 1991; Payzant, 1992; San Diego County Department of Social Services, 1991), nevertheless, point to a further subversion of family cohesion and autonomy. The additional supervision of family life by state and other agencies will not reinforce the family. It will likely provide the conditions for extending debilitation. The proposals for formal institutionalization of child development from birth to adulthood will probably have a similar weakening effect.

The estimation of the disadvantaged child population as 30% to 40% of the total child population brings to focus its centrality in the reforms. At the present, children at risk are the target of increasing attention by corporate business, educators, and various social agencies. The 1992 September issue of *Phi Delta Kappan* (74(1), pp. 18-40, 56-80) devoted 'A Special Section on Children at Risk'.

At the outset of the reforms, C. A. Grant and Sleeter (1985) reviewed the initial major reports and came to the conclusion that disadvantaged students would be more likely to be harmed by the reforms than benefit from them. They pointed out that the "reports said very little about handicapped students' access to instruction....[and] seemed to treat mainstreaming either as an accomplished fact, or as an issue not worth discussing" (pp. 149-150). Given the likely outcome that current classification and remediation and the increased attention to the disadvantaged will be maintained in the foreseeable future, students may be the target for

classification and remediation either under the traditional categories of disability or under newly created categories (or processes) for 'early intervention' and 'prevention'. Since the vast majority of disadvantaged children are minorities or financially poor the potential of social control intervention is enormous. Popkewitz (1991) has criticized the ameliorative program legislation of the 1960s and 1970s - the same legislation that corporate business has praised as 'successful' and 'beneficial' - as promoting powerlessness:

To establish remediation for the poor was also to incorporate languages of clinical medicine, behavior modification, and therapy into the general curriculum. Diagnosis and prescription became methods for treating all children, but especially those of the poor and minorities. Rather than challenging the powerlessness of the poor, the reform simply expanded the bureaucracies that defined the rules of that powerlessness and incorporated the discourse of remediation into the priorities of the communities that were "targeted" for help (p. 109).

There were several interdependent ingredients that served as the basis of educational reforms for achieving social control. First, the federal government with the support of business leaders and organizations assumed the role of steering the educational agenda, including the engineering of consensus among various social groups, to confine the objectives of American public schooling within the priorities of the state and the business community. The agenda could be refined at different layers by various professional groups but its elements remained basically the same. In doing so, localities were restricted to a narrow range of options; their role was to take decisions pertaining to the efficient implementation of these objectives. State governments and agencies have assumed a function of enforcing and monitoring implementation in a top-down fashion. There are some initial indications that this centralization of objectives and decentralization of implementation represent a trend taking place in other countries such as Australia, England, Wales, and New Zealand.

Second, educational and school problems and issues were decontextualized from their social dimensions. Inequality, discrimination, racism, inequitable distribution of wealth, to name a few, were all severed from school problems. Problematic schooling was then seen as the original cause of many social problems rather than their outcome. Schools became the framework or the lens through which to perceive society rather than the opposite. This is an extremely erroneous view because schools did not create American society, they were created by it.

In this process educational issues of critical thinking, teacher thinking, and teacher professionalization were also decontextualized and reified. To a significant extent, they no longer exist in a social-historical context but in and of themselves. Critical thinking, teacher thinking, and teacher professionalization do not imply the creation of systemic and historical questions to understand phenomena, it does not imply 'who' and 'why' questions; it only implies 'how to' questions, how to design things to work efficiently under predetermined conditions. In other words, understanding and questioning the social order are marginalized. Critical thinking is based on a model of teacher thinking that takes existing American society and social order for granted and as immutable.

Third, schools were tied directly to the world of work. Business-school partnerships were created by the thousands to guarantee the provision of appropriately trained 'high-ability' students and to socialize 'low-ability' and disadvantaged students according to the interests of corporations. The model of students as 'workers' was seen as the proper model ignoring the students' potential wish to accept or reject provided education. Emphasis was put on science,

mathematics, and technology as subjects that will be profitable to the students, businesses, and the nation.

Apart from the obvious utilitarianism of this emphasis, a social control intention may be another reason. Physical sciences, mathematics, and technology subjects have a fundamentally different way of structuring course content, and therefore learning and thinking patterns, from subjects in the humanities and the social sciences. Adler (1982) in *The Paideia Proposal* differentiated among groups of disciplines which focus on communication (language, literature, and fine arts), measurement and calculation (mathematics and physical sciences), and on critical judgment (social sciences). Janet G. Donald (1983, 1986, 1987, 1988, 1990) has conducted research on the structure of knowledge in the different disciplines and has come up with evidence that the physical sciences utilize a very structured way of organizing knowledge, the humanities a loosely organized structure, while the social sciences are in between the two (Donald, 1983, 1986). There are fundamental differences at all four levels which she used to examine disciplinary knowledge: nature of the concepts used, logical structure, truth criteria, and methodology (Donald, 1986). Knowledge structure can influence problem solving ability, methodology, and applicability:

The degree of structure interacts with and constrains the kind of problem solving procedures which can be applied (Donald, 1986, p. 277).

The methods designed to represent less well structured knowledge make fewer assumptions and thus could be expected to be more generally applicable (Donald, 1987, p. 196).

In general physical sciences tend to encourage methods of convergent thinking, the humanities methods of divergent thinking, with social sciences in between the two (Donald, 1986). The emphasis of the 1980s' reforms on physical sciences and technology may have the result of

promoting convergent thinking at the expense of divergent thinking. In a world dominated by forms of convergent thinking, problems would be defined narrowly, including problems of social nature. Social sciences, however, need not be excluded. They can be modelled after the methodology of physical sciences. Donald (1988) has found evidence of movement of the social sciences toward the physical science model in her study of university professors' expectations of students' ability to think:

[A]cross disciplines, differences in the expectations of students' thinking are greater between the social sciences and humanities than they are between the natural and social sciences....[T]he scientific culture embraces the social sciences to an unexpected extent. Perhaps this has developed in the last ten to fifteen years (p. 33).

Fourth, there was a drive to reinstate cultural literacy within an American and western heritage context. The swift increase of immigrants from third world countries and the perceived attempt in universities to 'discredit' western culture was seen by conservatives as a threat to American culture and democracy. Consequently, acculturation and Americanization of immigrants, a historical function of public schools, and a press for patriotism and nationalism were seen as essential adjuncts of educational reforms.

Fifth, there was a recognition and targeting of disadvantaged children and their families as a potential threat to the social order. Early intervention and prevention through preschool programs and interagency collaboration of schools with other agencies appears to be a strategy aiming to control the disadvantaged under the guise of remediation. The foundations for interagency collaboration, discussed in the following chapter, are currently being constructed.

The encompassing scope of reforms for achieving social control leaves little room for doubting that government and corporate-business policy makers have utilized social science in

future planning. They have access to a thorough and in-depth understanding of social trends, possibilities of social transformation, public manipulation strategies, and power brokering. It is not surprising that they have made use of this understanding. It would be more surprising if they had not, since most if not all social groups in American society would not voluntarily give up power. On the contrary, they would do anything to maintain and enhance their status. In the case of the 1980s' education reforms both the federal government and corporate business have demonstrated an ability to plan for change on both structural and procedural fronts. On the structural front, the federal government with the assistance of corporate business has operated the steering of the educational agenda. The state governments and business leaders involved in school-business partnerships have been responsible for enforcing the steering directives. Localities have been largely responsible for the implementation of the reforms. On the procedural front, the decontextualization of educational problems and issues from their social dimensions, the 'worker' student model, teacher professionalization, standardized accountability measures, and the overwhelming emphasis on science, mathematics, and technology subjects have been used to push a predetermined educational agenda.

The implications of these reforms do not appear very encouraging for disadvantaged students. All social organizations or systems have built-in arrangements to deal with individuals or groups who do not fit. Disadvantaged students and their families, despite the humanitarian rhetoric, are seen as a potential threat to the undergoing face-lifting of American schooling and its objectives. The humanitarian rhetoric of help and remediation appear to serve as a justification and legitimation of social control intervention. It is in this sense that the disadvantaged have been factored into the equation of structural and procedural educational reforms: as potential deviants.

CHAPTER 8

A Synthesis

[T]hose who are interested in or part of special education need to see the enterprise in terms of its social backdrop. Such a broadened perspective will not provide instant answers to why special educators are doing what they do or to what special educators ought to do. It will, however, make apparent the fact that special education is part of a much larger social process (Carrier, 1986, p. 305).

For the last two centuries, the priorities and emphases of U.S. society on economics have considerably influenced the objectives of public education, which in turn have determined the philosophy and practices of special education. The relatively recent attention to disadvantaged students and their families is the latest link in the chain of special education arrangements in American history. The intentions of these arrangements have been social-educational amelioration and social control. In this chain, the currently developing model of interagency collaboration appears to be the model on which services will be provided to the disadvantaged in schools. The implications of this model for the mainstreaming movement and students with disabilities, who are considered to be a constituent group of the disadvantaged population, seem to be far-reaching. An adequate understanding of these implications requires the placement of mainstreaming and special education in the general social-historical context of the United States.

U.S. Education in Historical Perspective

American public primary and secondary education were established and evolved in the contradictions of the surrounding social and historical conditions. There was prejudice and intolerance toward racial, ethnic, linguistic, and cultural minorities who immigrated to the United

States in successive waves over the last two centuries. There was the closely related issue of American ambivalence with respect to cultural uniformity and diversity as reflected in the metaphors of the 'melting pot' and the 'kaleidoscope'. There also was the reality of other- and self-imposed segregation among the various racial and cultural groups. At the same time there were declarations of equality, pluralism, justice, and social mobility.

Within this context, it was repeatedly pronounced that formal schooling should be the meeting ground of all social groups to form a common American culture. It was education that would play the crucial socializing link to maintain and promote the progress of the Republic and its institutions. Despite claims of altruism and objectivity all social groups have, at one time or another, tried to use schools for their own purposes. The Anglo-Protestants succeeded in instilling their vision of the ideal society in the general social order. Consequently, industrialization, urbanization, and the definition of American society as primarily an economic entity were the deciding factors in shaping public education and its objectives toward a common American culture defined largely by nondenominational protestantism, republicanism, nationalism-patriotism, the training of a disciplined labor force according to the economic realities of the day, literacy and knowledge, social control and order, social mobility, and since World War II technological and military supremacy.

One consequence of most of these objectives, which may also be seen as a hidden objective in itself, was the segregation of children with disabilities into institutions, special schools, or special classes - a trend that became increasingly magnified after the 1930s. The emphases on a common American culture, social control and order, and the individual as a unit for productivity implied that the students classified as disabled would most often come from poor

and culturally, racially, linguistically, or ethnically different families. Most students from these families were routed into vocational occupations through a sophisticated tracking system that was devised at the beginning of the twentieth century and which pervades American public schools even today. Special education may be seen as the bottom of the tracking ladder intended for those who either cannot engage in 'substantial gainful activity' (Berkowitz, 1987) or cannot conform to the conventions of school life.

Many contradictions were evident in special education. Despite the publicly declared intentions of amelioration, custody and social control became its primary goals. Toch (1991) has described classes for students with learning disabilities as "babysitting" (p. 127), and the same may be said of many other special education arrangements.

Perhaps the most noticeable contradiction has been the adoption of mainstreaming laws such as PL 94-142. It requires the placement of children with disabilities in the least restrictive environment, but at the same time it mandates the existence of a whole spectrum of services and encourages the identification of all children who 'need' special education services. It is no surprise, then, that the overall placement patterns have remained virtually unchanged for the special population as a single group at the national level from the enactment of the law till the latest academic year for which statistics are available, 1988-89. Placed in a social-historical context, it becomes more apparent why special education and remediation legislation such as PL 94-142 have failed to educate students with disabilities: the hidden intention of social control has been a strong inherent element.

The Recurrent Patterns of Amelioration and Social Control in Educational Institutions

It is proposed here that great, overhauling drives in special educational arrangements have occurred three times in U.S. history. The first happened throughout the nineteenth century and targeted paupers, dependents, and deviants whose origins were primarily from immigrant and socioeconomically poor groups, and from racially and culturally different groups. Members of the protestant clergy, the professions, and business (including the emerging industrialists) played major leadership roles. The second drive partially overlapped the first, occurring from approximately midnineteenth century until the 1920s, and targeted the 'feeble-minded' and deviants whose background again was mainly immigrant, poor, and racially and culturally differing groups. Members of the professions and business (mainly industrialists) kept their leading role, while the protestant clergy's role decreased over the years and state and federal involvements increased. These first two drives and their outcome of social control have been thoroughly documented in the literature (e. g. M. Adams, 1971; Callahan, 1962; P. D. Chapman, 1988; Davies, 1930; Gross, 1962; Hawes, 1971, 1991; Higham, 1970; Hofstadter, 1955; Kanner, 1964; Mennel, 1973; Milofsky, 1989; Pickett, 1969; Rothman, 1971; Schlossman, 1977; Schultz, 1973). The third one, currently underway, began in the 1960s and targets disadvantaged children and their families (immigrants primarily from the third world, individuals with disabilities, socioeconomically poor, various minorities, and teenage and poor single parent families). The federal government, corporate business, and professionals have provided most of the leadership.

The two main elements or intentions in all three drives have been educational and social amelioration and social control. However, the main outcome of the first two drives has been

social control. Business and professionals have always been involved in setting the agenda while the emergence of the federal and state governments is characteristic of a trend toward increasing state interests in educational matters. All of these leading groups have had immense interests at stake by maintaining social stability, the *status quo*, and power balances. Failure to maintain social stability would have led to the collapse of the *status quo* and a redistribution of power. It appears that it is in this context that disadvantaged students are currently viewed by powerful social groups. Targeting the disadvantaged, who are perceived to be a threat to the social order, for 'help' seems to represent a disguised attempt at social control - an attempt that has been documented historically as politically feasible and effective. These three drives are discussed below.

Campaigning Against Pauperism, Dependency, and Deviance

The view of colonial era Americans of poverty, deviance, and dependency as a state of 'Divine providence' was discarded in the beginning of the nineteenth century in favor of the view of 'corrupting' environmental influences such as ill-functioning families and society. In the former view, poor, dependent, and deviant individuals were considered to be part of the community and were dealt with either assistance or correction within the community. In the latter view, however, the mode of assistance and punishment became the responsibility of emerging institutions, and the targeted individuals or groups were not accepted in the community unless reformed - a rare occasion.

The perceived expansion of deviant groups was comprehended as a threat to social stability by powerful citizens and social groups. The intentions of intervention were of

contradictory nature. Some felt that paupers, dependents, and deviants needed assistance while others thought that they should be controlled if democracy, prosperity, and the country were to survive. These two intentions meshed for the purpose of creating institutional arrangements that reflected their contradictory origins.

The propounded rationale for institutionalization and segregation from the community was that institutions were free of 'corrupting' influences and thus prone to providing a proper environment for reformation. Caretakers and their advocates publicly stated a familial and compassionate ideology. In reality and practice, nevertheless, institutions were increasingly based on complete segregation from family and community, and on discipline, regimentation, and moral and religious foundations with some ingredients of literary instruction. Prisons, almshouses, asylums, poorhouses, houses of refuge, and reformatories all depicted this contradiction. By the Civil War the educative, alleviating intention of these institutions had largely disappeared. They had mainly become custodial institutions for purposes of social control.

The 'Menace' of the 'Feeble-minded' and Deviant

Concurrently with the campaign against pauperism and dependency at midnineteenth century, the 'feeble-minded' were also targeted for eligibility of institutional remediation. The initial argument was that since schools were established for the general population, training schools should also be organized for the benefit of the 'feeble-minded'. The same network of organizations and individuals which led the establishment of public schools, reformatories, almshouses, poorhouses, penitentiaries, houses of refuge, and asylums was also behind the advocacy of creating training schools for the 'feeble-minded'.

Again, the intentions were twofold: educational and social remediation and social control. By the end of the nineteenth century, the educative function had been completely replaced by the social control function resembling the military regimentation model of the other institutions. The 'feeble-minded' were seen during the first two decades of the twentieth century as nondistinct from deviants and were blamed for almost all societal problems including poverty, crime, and immorality.

The innovation of intelligence testing at the beginning of the twentieth century was seen as an efficient way of identifying and classifying 'feeble-minded' individuals and as a major scientific discovery since there was no 'reliable' method of identification before this invention. The high percentage in samples of the population diagnosed as having inferior intelligence led to renewed alarmist declarations about dangers to democracy and prosperity. In 1917, for example, almost half of the draftees were identified as 'feeble-minded' by the army alpha intelligence tests. Laws were passed across states stripping those identified as 'feeble-minded' from their civil rights including procreation and voting. Immigration restrictions were legislated against ethnic and racial groups thought to 'breed' significant levels of inferior intelligence. This despite the fact that intelligence tests were linguistically and culturally biased against immigrants, the poor, and minorities. By the 1930s, intelligence testing along with a campaign for vocationalizing education had led to the establishment of rigid tracking and special education systems. Both continued to grow in the following decades.

Campaigning for (or Against?) the Disadvantaged

Since the 1960s, corporate business has expressed its interest in disadvantaged (or at risk) children and their families. The Committee for Economic Development (CED) has perhaps been the single most influential business organization on reinitiating the focus on the disadvantaged. CED is a strategic planning business organization whose membership is comprised of the highest level executives from all the major corporations in the United States. It also has a small membership of academics and is well connected to universities, conservative foundations, and the media.

CED has released several publications on the state of American education since the late 1960s making insistent recommendations on the 'necessity' to devise arrangements that are geared toward the educational and social 'needs' of the disadvantaged. What becomes apparent in these publications is the similarity of discourse regarding the disadvantaged and the campaigns against pauperism, dependency, deviance, and 'feeble-mindedness'. The recent humanitarian rhetoric and contradictory intentions, the targeted social groups, and the general educational developments resemble the historical circumstances and transitions of the first two special education drives over the last two centuries.

The rhetoric is distinctly humanitarian. In *Children in Need: Investment Strategies for the Educationally Disadvantaged* and *The Unfinished Agenda: A New Vision for Child Development and Education*, it is impressed upon the reader how poverty has been growing, how the human resources of the disadvantaged are wasted, how increasing global economic competition necessitates the contribution of all citizens to productivity. In sum, it is declared that both the disadvantaged and American society will prosper, only if appropriate arrangements are made to

educate and integrate disadvantaged children into mainstream society. To achieve this end, business leaders have expressed their desire to become the main advocates of the disadvantaged. In the introductory paragraphs of *Children in Need*, the educational manifesto of corporate business regarding the disadvantaged, it is stated:

For generations, the American Dream has been to live in freedom and to have the opportunity to pursue a satisfying life, reap the benefits of economic prosperity, and partake of the privileges and responsibilities of citizenship in the world's foremost democracy. But as we stand on the threshold of the twenty-first century, that dream is in jeopardy.

This nation cannot continue to compete and prosper in the global arena when more than one-fifth of our children live in poverty and a third grow up in ignorance. And if the nation cannot compete, it cannot lead. If we continue to squander the talents of millions of our children, America will become a nation of limited human potential. It would be tragic if we allow this to happen. America must become a land of opportunity - for every child.

Yet, the United States is creating a permanent underclass of young people for whom poverty and despair are life's daily companions. These are youths who cannot hold jobs because they lack fundamental literacy skills and work habits. They feel alienated from mainstream society, and they seldom participate in the democratic process. They cannot attain the living standard of most Americans because they are trapped in a web of dependency and failure (CED, Research and Policy Committee, 1987, p. 1).

All the familiar themes of previous eras are present: poverty, dependency, permanent underclass, the threat to economic prosperity and democracy, and the need for help. The similarity of intentions is also striking. On the one hand, concern is expressed with the waste of talent and lives. On the other hand, the notions of dependency, underclass, and threats to prosperity and democracy ring as familiar alarms which preceded oncoming campaigns of social control in the past. If history serves as guide, it appears that this is another campaign, the third one in U.S. history so far, of amelioration and social control targeting disadvantaged students and their families.

The profile of the disadvantaged is noticeably similar to the targeted groups of earlier eras. This profile is described in *Children in Need*: recent immigrants from the third world; racial, cultural, and linguistic minorities; children with disabilities; single-parent families usually headed by women; poor families; teenage parents and their children; and children in inner-city schools. The whole disadvantaged group is currently estimated at a potential 30% to 40% of the student population (CED, Research and Policy Committee, 1991, pp. 8-9).

Comparing past and present social conditions, it seems that the U.S., and the same may be said for most western democracies and other industrial-technological societies, is and has been for some time at a major political, social, economic, and educational transition. Previous transitions coincided with educational reforms that were sustained over decades to evolve concurrently with the realities of the day. These reforms have had inherent elements of social control for the general population as well as provisions of social control for potentially deviant social groups. There were immigration waves during the nineteenth and twentieth centuries, the transition of the American economy from agriculture to industrialization, and progressive urbanization with their consequent results of social and economic dislocation. All these trends had profound influences on educational reforms.

The current social-historical circumstances bare a striking similarity to the conditions of previous transitions. First, there has been a new wave of immigration to the U.S. since the early 1970s, this time primarily from the third world (Reimers, 1985). Second, economic restructuring and a transition from an industrial-based to a technology- and information-based economy have been occurring during the last few decades in the United States. Third, there has been a prolonged effort by the federal government since World War II to reform public schools, of

which the 'excellence' movement of the 1980s is an extension. This time there is a new addition: worldwide economic rearrangements, which probably serves as an explanation for the emphasis on schooling as preparation for global economic competition and for the similarity and almost parallel timing of educational reforms in many western democracies. Fourth, there has been pervasive social and economic dislocation in the United States over the last few decades because of worldwide economic restructuring.

Viewed in this context, legislation for special educational arrangements over the last few decades acquires a quite different meaning. There is little doubt that many social groups such as parents and advocates of individuals with disabilities have genuinely worked toward improvement. In many instances the results of their efforts have been truly remarkable. However, these efforts have been constrained by the social-historical context of contradictory intentions in educational reforms, of which social control appears to hold a stronger footing. It is in this context that special education and the mainstreaming movement have to be placed if they are to be adequately understood.

The Expansion of Special Education After the 1920s

The most significant increases in the special education population occurred after the 1920s. The 'menace' argument, eugenics, and intelligence testing combined to produce an ideological commitment to the identification and classification of individuals with disabilities, which sought to translate theoretical estimates of disability into observed occurrence. The special population increased by an immense 1,552% in the period between 1932 and 1970 (see Table 3) while the whole elementary and secondary school population increased by 75% during the

same period (see **Table 2**). In the years between 1970 and 1989 the whole elementary and secondary school population decreased by 12% (see **Table 5**) whereas the population served in special programs increased by 70% (see **Table 6**). In terms of enrollment percentages, only 0.62% of the total public school population was enrolled in special education programs in 1932 (calculated from data in **Tables 2** and **3**), while this percentage had skyrocketed to 11.30% in 1988-89 (see **Table 7**).

After the deinstitutionalization movement and federal legislation of the 1960s, contradictory developments occurred in special education. Advocates of individuals with disabilities were largely successful in pushing for deinstitutionalization. Federal legislation, nevertheless, boosted the exceptional student population by providing funding and incentives for the identification and categorical classification of a greater number of students. The category of learning disability was a relative newcomer but it doubled its proportion in the overall special population from 21.6% in 1976-77 to 43.6% in 1988-89 (see **Table 6**) and was largely responsible for the overall increases.

The Effects of PL 94-142

The passage of PL 94-142 in 1975 was part of these contradictions. Parents of students with disabilities gained the right to due process and to challenge placements they perceived as improper. At the same time, however, the law reinforced the expansion of the special education population and of a bureaucratic maze that made the exercise of the rights of parents and students with disabilities more dependent on professional authority. In this sense, PL 94-142 and its

successor PL 101-476 are continuations of previous federal legislation regarding children with disabilities rather than a break with the past.

This appraisal is supported by the fact that at the national level between 1977-78 and 1988-89 there has been very little or no change in placements for the whole special population as a single group (see **Tables 9, 10, 11, and 12**). When broken down to the individual disability categories, contradictory patterns were found. Almost no change toward less restrictive environments has occurred in the learning disability category, a notable finding since it is the largest disability category. In the serious emotional disturbance and mental retardation categories (caution previously noted for mental retardation category) movement from less restrictive to more restrictive environments has taken place. Progression from more restrictive to less restrictive placements has developed in the orthopedic handicap, speech impairment, hard of hearing and deaf, and visual handicap categories. In the health impairment, multihandicap, and deaf-blind categories there has been simultaneous movement toward both less restrictive and more restrictive placements.

Mainstreaming: Barriers and Prospects

The General Context

The obstacles to mainstreaming are not confined to the context of public schools. The stalemate outcomes of PL 94-142 are not incidental. This law and its successor PL 101-476 have inherent both progressive and regressive intentions. The progressive intention of making public education available to all students with disabilities has become regressive by the implementation process. The inertia and tradition in American education have operated in many ways to thwart,

if not completely prevent, the genuine integration of students with disabilities for the benefit of all students, benefit defined from the students' and their families' points of view and interests. Several interrelated factors have contributed to this: a 'pull-out' mentality, the aversive effects of many of the formal education objectives, and the concept of society as an economic entity.

First, there is the tracking, remediation, and 'pull-out' mentality ingrained in the minds and practices of most American educators and in the educational system itself. This philosophy has developed over the last hundred years on the assumption that it benefits students when in fact its results have been much more harmful than helpful. As Joseph M. Hawes (1991) has commented "[s]ome agencies that supposedly exist to protect children and act in their best interests turn out to be harmful to those they are chartered to serve" (p. 124). The pervasiveness of this philosophy is such that sometimes it appears that the whole system has to be deconstructed and reconstructed anew.

Second, there is the aversive effect of some of the stated and hidden objectives of formal American schooling adopted from its very origins. Pursuing cultural and instructional homogeneity, training for the world of work of each era, espousing an almost blinding nationalism-patriotism, indoctrinating obedience to the social order of the day, providing naive information about the rights and responsibilities of citizens in American democracy, and preparing students to actively contribute to the development of American society for technological and military supremacy seem to have victimized a substantial percentage of the school population. Immigrant children with differing cultural backgrounds or students who do not fit widely accepted instructional methods become potential targets for exclusion and remediation on the premise that there is something wrong with them. Students are put through monotonous

instruction of which the hidden objective is to be able to sustain and perform repetitious tasks on the factory floor or in the office. Those who cannot endure boredom in the classroom may end up with the label of 'emotional disturbance'. And since somebody has to perform low-paying jobs vocational tracking becomes a convenient way to stream students according to 'ability'. It is impressed upon students that their ultimate loyalties are due to the nation, that they ought to have respect for the social order, and that they should support American democracy because it is a 'good system of checks and balances'. If students point to the inconsistencies of the nation and the social order regarding liberty and justice they may be seen as potential 'trouble makers'. And many students are currently encouraged to seek education for a technological world but those who are not interested or resist this imposed education may be branded as being 'low achievers'.

Many of the objectives of American formal education appear to have been irrelevant to the lives or interests of a significant number of students coming primarily from immigrant and culturally differing groups, various minorities, those with disabilities, or the socioeconomically poor. These social groups have been seen as potentially deviant either because they have been marginalized (discriminated against) or because many of their members do not want to participate in mainstream American society in its current form. In either case, formal schooling has provided one of the many social control mechanisms: tracking and special education.

Third, there is the definition of American society as an economic entity, which has largely driven the operation and structuring of American society and formal education. Many of the objectives of schools have been the direct consequence of this definition. The emphasis on science, mathematics, and technology in the educational reforms of the 1980s was neither

incidental nor new. It was rather the culmination of a long chain of historical developments in American education toward utilitarianism whose origin can be probably be traced to the concept of society as an economic entity. This concept has largely influenced the exclusion of individuals with disabilities since they always have been regarded as not being able to engage in gainful employment.

All these three factors are closely linked. The initial link of society as an economic entity, in combination with the Anglo-Protestant idea of the 'work-ethic' and the emerging industrialization in early nineteenth century, influenced the objectives of schools in the United States, which in turn were influential in establishing and promoting tracking and special education. The obstacles to mainstreaming, therefore, are not confined to the school context. Obstacles are not just funding and classification patterns, the dichotomy between regular and special education, school organization and routines, teacher resistance and teacher preparation programs, opposing court decisions, professional authority powers, or lack of adequate support for teachers and students with disabilities. These are significant obstacles indeed, but they are the symptoms rather than the causes of exclusion of students with disabilities. Addressing the problem at that level would mean just scratching the surface, and any reforms would likely be doomed to failure. Instead, there should be an examination of the fundamental issues: the objectives of formal education and how they are driven by more general societal considerations and priorities.

Disadvantaging the Disadvantaged

The priority that has been placed on the disadvantaged during the last few decades will probably have a direct influence on the educational arrangements of students with disabilities because the latter are considered to be one of the disadvantaged groups. It seems that the sustained efforts of the federal government and corporate business since the end of World War II to adapt some of the methods of social control through educational reform have factored in the disadvantaged as the social group of potential deviants.

The educational reforms of the 1980s were to a large extent the result of efforts of the federal government and corporate business. Most of the reports on the state of American public schools that were released adopted the corporate model. The hidden intentions of the reports (engineering consensus, shifting the blame of economic problems from business management decisions to public schools, reopening discussion on the role of government and business in education, and refocusing educational issues from equality and justice to the economy) appear to have been considerably successful. The themes of the reports revolved around economic competitiveness as dependent on schooling, higher academic standards, student and school accountability, equity and the disadvantaged, civic responsibilities of citizens, survival of American democracy and the social-political order, emphasis on science, mathematics and technology, and teacher professionalism.

All these themes were reified and disconnected from their social origins and were restrained within a school context. The result was a narrowing of the educational agenda, centralization of decision making, the implementation of reforms that contradicted many of the 'quality' schooling rhetoric, the close linking between schools and business through partnerships

and correspondingly geared curricula, and laying the foundations that may base the model of teacher professionalization on compatible terms with state and corporate- business interests.

Based on the corporate-business recommendations of early prevention and intervention, the disadvantaged have been targeted for educational and social amelioration by school, government, and other social agencies. It is aspired that sustained intervention should be planned and effected in the lives of disadvantaged children and their families encompassing all the developmental stages of children from birth to young adulthood. Given the experience of amelioration with paupers, dependents, deviants, the 'feebleminded', and people with disabilities over the last two hundred years, the most likely outcome may be a failure to provide substantial improvement in the lives of the disadvantaged. The hidden intention of social control, however, will probably function to put the blame for the circumstances and problems of the disadvantaged on themselves. This appears to be a century-old strategy: the internalization of blame by victims for their disadvantaged situation. The model of 'interagency collaboration' seems to be the most plausible candidate to take up the task. Projects of this nature such as New Beginnings are already underway.

The Case of New Beginnings

Professional collaboration has become the buzzword of the day in education. It is proclaimed as the appropriate model of doing things, for example, in mainstreaming (Stainback & Stainback, 1990b), in school-university partnerships (A. Lieberman, 1992), and interagency arrangements to provide services to disadvantaged children and their families (Payzant, 1992). In *Thinking Collaboratively* Charles Bruner (1991) has pronounced professional collaboration as

the most appropriate model for education. New Beginnings, an interagency collaboration project in San Diego, California, is examined here. This examination is based on the account by Thomas W. Payzant (1992), superintendent of the San Diego City Schools and one of the initiators of the collaborative.

The rationale given for collaboration among agencies is an impending sense of doom. Payzant (1992) cites Roseann Bentley, co-chair of the commission established by the National Association of State Boards of Education and the American Medical Association to study problems facing adolescents, as saying that "[w]e are absolutely convinced that, if we don't take action immediately, we're going to find ourselves with a failing economy and social unrest" (p. 140). He voices similar concerns:

It must be obvious to even the most casual observer that the gap between the haves and the have-nots in the U.S. is widening. More people are living in poverty, many are homeless, a disproportionate number of the poor are mentally ill, a high percentage of the poor are African-American or Latino, and a surprisingly large number of them are children (p. 139).

Poverty, homelessness, and untreated physical and mental disabilities threaten to overwhelm every social service agency in the nation (p. 140).

Immediate action is called for, and I am convinced that the public schools must play a leading role. The days are past when schools could concentrate simply on basic education and leave a child's social, physical, psychological, and economic needs to others (p. 140).

Notice the combined intentions of social amelioration and control.

Propelled by this rationale, in 1988 a number of leaders of social agencies in San Diego started informal discussions to find common ground for collaboration by overcoming a variety of obstacles: conflicting regulations, confidentiality of client information, turf and responsibilities, overlapping services, and different notions of collaboration. This discussion led to a number of

"shared assumptions" (p. 141): that San Diego is plagued by many problems involving a large and increasing immigrant population, low-cost housing, and geographical mobility of poor families; that agencies have to do more with decreasing funding; that intervention should start in early childhood, not adolescence, and that it should not focus on individual students but their families; that personnel from different agencies do not trust each other; and that interagency collaboration should be led by the top-level executives of the participating agencies (Payzant, 1992). Notice the targeting of immigrant and poor families, the emphasis on early intervention, and the family as the unit of intervention.

As this 'consensus' emerged, and the author insists that it is important to have consensus before any collaboration is initiated, the participants decided to form New Beginnings as an "interagency forum" (p. 140) consisting of the County of San Diego, the City of San Diego, the San Diego City Schools, and the San Diego Community College District. At a later stage of the project the San Diego Housing Commission, the Medical Center of the University of California at San Diego, and the Children's Hospital joined in as well (Payzant, 1992). Notice that the composition of the forum consists completely of local agencies and that emphasis is placed on consensus.

The next step was to study the possibility of establishing a collaborative center at a local school, because of easy access to students and their families (notice the school as the crucial connecting link among social agencies). Hamilton Elementary School was chosen in the City Heights part of San Diego for the study. Commenting that similar schools and neighborhoods exist in all large cities and in many smaller communities, Payzant (1992) describes the area, its inhabitants, and the school:

Hamilton's attendance area is a densely populated, highly transient, ethnically mixed neighborhood. It has one of the city's worst crime rates and the highest reported incidence of child abuse. Hamilton's enrollment is about 1,300 students in kindergarten through fifth grade. The school also has a state-funded preschool program for 4-year-olds. The building was constructed in 1978 to accommodate 750 students and is now supplemented by 28 portable classrooms. Hamilton operates on a multi-track, year-round schedule.

The district's most recent racial/ethnic census report shows that the school is 40% Latino, 24.5% Indochinese, 24% African-American, and 8.6% white....The school serves 23 language groups, and more than half of the students do not speak English as their native language. A majority of the students at Hamilton live in single-parent households. More than 90% of the children are eligible for the federal free or reduced-price lunch program. About 46% of the school's households receive Aid to Families with Dependent Children (pp. 141-142).

Notice the perfect overlap between the population targeted for interagency collaboration and the profile of the disadvantaged population.

The study, which was conducted in 1990, came to the following conclusions: families "need help in finding help" (p. 143); agencies have to completely restructure themselves and their services for interagency collaboration; families' attitudes toward agencies are positive when identified with the school; social agency personnel have a more pessimistic appraisal of the studied families' situation than the families' self-perceptions; social agencies are too fragmented, have overlapping services, and do not share information; social service providers feel "frustrated" and "dehumanized" (p. 143) by not being able to break the cycle of recurring problems in these families; and agency staff should become advocates of the families with whom they are working (Payzant, 1992). Notice the following: the assumption that families wish to receive social services; the positive attitude of families toward schools and their associates; the discrepant perceptions between agency staff and families regarding the condition of the latter; and the inability of agency personnel in the past to offer substantial solutions.

Consequently, it was decided to establish a New Beginnings interagency center at Hamilton Elementary School. Payzant (1992) states quite clearly that these efforts are not just a project but a committed endeavor "to develop a long-term strategy for systemic change in the way services are provided to young people and their families" (p. 140). This endeavor is based on a 'practical' vision, a perspective taken from Melaville and Blank's (1991) *What it Takes: Structuring Interagency Partnerships to Connect Children and Families with Comprehensive Service*:

A practical vision requires that members move beyond generalities, come to terms with the assumptions underlying their vision and consider the accommodations that may ultimately be required (p. 22).

Notice the emphasis of basing systemic change on a 'practical' vision.

Based on this vision, New Beginnings is currently offering health, social, adult education services, and an "expanded student registration, screening, and family assessment process [which] has become one of the center's primary activities" (Payzant, 1992. p. 143). Staff members work both at the school interagency center and at their home agencies. The staff members working mostly at the school are called Family Service Advocates and they work directly with families:

They provide information about available services, help determine eligibility, work with families to create and follow a plan for moving toward self-sufficiency[,....provide some direct counseling....[and] help families navigate within the social services system (p. 144).

Notice the centrality of family assessment and the dependence of families on professional authority for 'self-sufficiency' planning and 'navigation' in the social services system.

Teachers in the school are also important participants in the collaborative:

The school is a primary source of referrals. Classroom teachers refer to the center those children who are experiencing academic, behavioral, attendance, or health problems. Teachers receive training in identifying problems and in techniques of supporting the efforts of the agencies. They also learn about the roles of staff members of other agencies and about the services they provide. There is regular communication between the teachers and the workers at the center as they constantly assess the impact of services on the children (Payzant, 1992, pp. 143-144).

Notice the function of teachers as referees, and of the school as a place of referral and assessment.

Interagency Collaboration: Renewing Social Amelioration and Control

Several themes are emerging from the case of New Beginnings. First, there is a striking similarity between this project and the recommendations of corporate business. The targeted population is disadvantaged students and their families, the focus is on early intervention and prevention (Hamilton is an elementary school with kindergarten and preschool programs), and the method of help is collaboration among agencies.

Second, all participating agencies are local and they stress consensus, a 'practical' vision, and leadership by their top executives. Even though it might not have been transparent to New Beginnings participating agencies, substantial consensus existed even at the time their leaders decided to form a forum because they shared one major underlying assumption; that schools and agencies can solve the social problems they are targeting. Hence, the remaining assumptions to be negotiated followed a predictable pattern. A 'practical' vision, a historical characteristic of many social agencies in the United States, was adopted. This vision is the tendency to 'move beyond generalities' or in other words to treat social problems out of context and by amelioration that in many instances may resemble patchwork. Leadership by the top executives of the agencies

assured the adoption of and commitment to this vision. Even though the federal government and corporate business appear to be absent, the success of their steering function is evident in the choices made and the methods used by localities - an indication that the hidden intentions of educational reforms have been quite successful.

Third, the centrality of the school as the connecting link of various agencies is convenient and efficient. Schools are places with a captive audience, whereas other agencies on their own may face problems of accessibility of and cooperation with students and their families. The positive attitude of many families toward school, which was found in the study, is another good reason to place interagency centers in schools.

Fourth, dependency of families on professional authority will probably emerge from these collaborative arrangements. Agency staff, by assuming the role of advocate, presume that they know 'best' what the interests of the families are. The stress on the need to 'help families get help' and the disparity of perceptions between families and agency professionals regarding the seriousness of the families' condition are direct consequences of this mentality. With respect to the latter Payzant (1992) comments:

Interestingly, the families see themselves in better condition than the agency personnel see them, but they do feel plagued by short-term problems. The service providers are more likely to see the families as having many long-term needs. Clear discrepancies exist between the perceptions of the families and those of the agency workers (p. 143).

Fifth, referral and assessment occupy a central position. The school functions as a place where teachers refer students with academic, behavioral, attendance, or health problems to the interagency center. And it is not just students who are placed under scrutiny but their families as well.

Sixth, there are issues of confidentiality and intrusion of privacy. The agencies collaborating in New Beginnings conducted another study addressing confidentiality and came to the conclusions that "modest changes in the law and in state regulation....would facilitate interagency exchanges without compromising confidentiality" (p. 145) and that "[m]ost barriers to the safe and open exchange of confidential information are management issues" (Payzant, 1992, pp. 144-145). In the view of participating agencies, then, confidentiality and privacy are not debatable ethical issues but mere technicalities to be resolved by 'modest' legislative, regulatory, and management changes. In *The Children's Rights Movement*, Joseph M. Hawes (1991) gave a historical review of the child advocacy and protection movement in the U.S. over the last three hundred years. He came to the conclusion that "efforts for the last 22 years have reduced or reversed the efforts of the children's rights movement to win some basic decency for the nation's youngest and poorest citizens. The child protectionists want to expand the protective agencies, and expand their reach as well" (pp. 124-125). Previous historical experience of ameliorative efforts as harming targeted children and the social organization of their families may be repeated in the emerging collaborative arrangements. Family cohesion may undergo further erosion by intrusive intervention and formal institutionalization and monitoring.

The meshed patterns of amelioration and control are apparent in interagency collaboration. Most of the professional educators who are involved are probably not aware of the duality of reforms and the potential for social control because of their ahistorical approaches. "We have come far enough to learn that there is power in collaboration that none of us envisioned when we began", Payzant (1992, p. 146) concludes. Indeed, there is tremendous power in the hands of educators in the form of a double-edged sword: one side represents social and educational

amelioration, while the other social control. The long term outcome depends on which side of the blade is sharper.

Historical precedent seems to point out that the side of the blade representing social control may prove to be sharper, especially when social conditions in the United States keep deteriorating. Even some preliminary signs appear to be pointing to this direction. The feelings of 'frustration' and 'dehumanization' of agency personnel, by their failure in the past to effect substantial change in the conditions of the disadvantaged, is evidence that social problems which were originally not created by these agencies cannot be solved in their context. The collaboration of these agencies with schools will probably accomplish little more since the targeted social problems were not created in schools either. The problem of inadequate health care, for example, is largely the result of inequitable wealth distribution, decisions by federal and state governments, and the unfavorable disposition of medical associations and corporate business. It is interesting that New Beginnings has already faced problems with its health services, perhaps the aspect most beneficial to disadvantaged families:

The health component of the center has been one of the most difficult to establish, reflecting the fragmentation and underfunding of health services for poor children in our country (Payzant, 1992, p. 145).

We must wait for action at the state and federal levels to develop a mechanism for reimbursement so that our health services can be sustained without depending on special funding (Payzant, 1992, p. 145).

The decreasing amount of available resources may make necessary the taking of hard decisions which will not necessarily be to the benefit of the disadvantaged families:

Calling for a comprehensive system of child-centered and family-oriented services...sounds good, but its creation will require changes and trade-offs in how, where, and by whom resources are distributed. It will also raise difficult issues of quantity vs. quality in service delivery, and equality vs. equity in determining who should receive limited resources (Melaville & Blank, 1991, p. 22).

If beneficial aspects such as health care become too expensive to maintain or defunct for whatever reason, interagency collaboration arrangements will probably be sustained because of their social control function - an outcome that would be consistent with previous historical reforms of social amelioration and control.

The enthusiasm with which the model of professional collaboration has been adopted in a variety of educational undertakings serves as an indication that interagency collaboration is here to stay and expand. In *The Unfinished Agenda: A New Vision for Child Development and Education*, CED (1991) discusses a variety of models of interagency collaboration which are based in schools or in other locations (pp. 16-38). Models of interagency collaboration other than school-based, therefore, do exist and are possible options. This may lead to a variety of arrangements in the U.S., but the most likely model to predominate on a large scale is school-based interagency collaboration. The reason simply is accessibility: students in schools, and by extension their families, are a captive audience.

Likely Effects of Interagency Collaboration on Mainstreaming

When comparing the model of interagency collaboration with the model of networking and professional collaboration recommended by mainstreaming advocates, it is apparent that the processes are quite similar. They both focus on collaboration among individuals, groups, and agencies. Let it be said, nevertheless, that the same process can be used for completely

antithetical purposes. Collaboration can be used for superficial education, for gearing students toward narrow technological approaches, or for producing compliant and prejudiced citizens. It also may be used for incisive education, for guiding students toward widely enlarged academic approaches, or for facilitating self-reflecting and critically minded citizens. The outcome depends on the objectives and intentions of the social groups that to a large degree influence the scope of the educational agenda. If the educational agenda is set according to narrowly defined interests and for the benefit of a select few, then the former approach will largely predominate in the implementation process. If the educational agenda is genuinely set to reflect the interests of the whole population, then the latter approach will mainly prevail.

Given the ahistoricity of many American educators, there is a high potential of confusing process with intent. The current educational reforms will probably, based on historical precedent and initial indications, work to control the disadvantaged. Despite rhetorical declarations the intention is to discourage thoughtfully informed citizens, cultural diversity, racial equality, and acceptance of individuals with disabilities. It is probable that mainstreaming advocates will find themselves in a situation similar to the stalemate of the last two decades after the enactment of PL 94-142: a lot of rhetoric about less restrictive environments but little substantial change. This time, however, there may be the appearance of positive change while the disadvantaged, a larger proportion of the American population than just the disabled, are targeted for remediation and social control.

There are currently three possible options of educational arrangements for students with disabilities. In the first one, the barriers and obstacles may disappear to pave the way for genuine integration - a highly unlikely scenario given the existing conditions that have been recounted.

In the second alternative, things remain as they are, hardly a satisfactory option. In the third one, students with disabilities may be placed in the mainstream but under the conditions of interagency collaboration. It seems that the third option is more plausible than the first two in the present circumstances.

The option of mainstreaming within the confines of interagency collaboration would be a severe compromise. It may be a compromise that can eventually lead to a dead end. There are several reasons for this conclusion: the emphasis of U.S. society on economics, the purposes of social control intrinsic to interagency collaboration, the appearance of confusion of mainstreaming advocates pertaining to the meaning of the 1980s' reforms, the intrusive arrangements of interagency collaboration, and the ahistoricity of most American educators.

First, the exclusion of people with disabilities has its origins in the objectives of American public schools which have been driven by the definition of society as an economic entity. The latest reforms have worked not to minimize the effect of this definition on the objectives of schooling - on the contrary, they have reinforced it. Thus the calls for schools connected to the world of work, for school administrators functioning as business executives, for 'free-choice' in schools, for successful schools rewarded by attracting a 'larger share of the school market', and for unsuccessful schools to be punished by bankruptcy. One basic requirement for genuine mainstreaming is a decreased emphasis of society on overproduction and overconsumption. In other words, students with disabilities will benefit in a society in which individuals are more than a population of cashiers and schools are more than a training ground for cashiers. Societal priorities on productivity and fiscal matters give educators little elbow room to make substantive choices.

Second, special education in its current form has lost its function of social control. It has been plagued by law suits and counter suits, by accusations of discrimination, arbitrary labeling and rigidity, and by expenditures that would have been unheard of when it was established. PL 94-142 has contributed significantly to this arbitrary labeling, expansion of the special population and increased spending, and has been under fire from New Right conservatives (e.g. Heritage Foundation, 1984), liberals (e.g. Toch, 1991, pp. 126-127), and advocates of 'purposeful' mainstreaming (e.g. Stainback & Stainback, 1984). From all viewpoints, the learning disability category has been seen as the main obstacle. The Heritage Foundation has perceived it as a category in which many children have been misplaced and has called for abolition of mainstreaming and for segregation of those students who cannot attend regular classes without 'harmful' effects to themselves and other students. Mainstreaming advocates have called for merging regular and special education. These two positions may appear to be totally conflictual but they have much more of a common ground than both parties suspect.

Segregation and mainstreaming may take place simultaneously. A relatively small proportion of students - those with severe disabilities - may end up in segregated settings. Most of the others, especially those classified as learning disabled, may end up in the regular classroom for a large part of the school day with some provisions for resource room remediation. These arrangements will separate those students who have discernible and easily identifiable disabilities from those students who have no visible manifestations of disability. As Carrier (1986) has put it, "[h]andicapped children are not the same as children in special education...because the bulk of children in special education would not be considered handicapped outside of school" (p. 288). Students in official disability categories are considered to be part of the disadvantaged population.

Therefore, even if mainstreamed, they will be eligible for remediation through interagency collaboration. This likely outcome will offer little advantage.

Interagency collaboration, from a social control point of view, will be much more effective than special education because the latter has come under too much scrutiny and has become too expensive. More importantly, interagency collaboration will operate in the mainstream of education having the advantage of targeting the whole student population, although it will probably focus on the disadvantaged. Assessment, classification, and remediation procedures will likely be more subtle in the mainstream than in special education. The fact that interagency collaboration uses a very similar process model as 'purposeful' integration may obscure the fact that the two are based on almost contrary intentions. The former is an extension of corporate business and government interests of social control, while the latter is an extension of inclusive education philosophy.

Third, there are signs of confusion on the part of many advocates of 'purposeful' mainstreaming regarding the meaning of the 1980s' education reforms. A few examples may help bring this confusion to perspective. Falvey, Coots, and Bishop (1990) have portrayed the business community as genuinely caring for schools. While there is little doubt that there are individuals in the business community who care about schools, corporate business as a social group seems to be concerned only insofar as its interests are promoted in schooling. Vandercook and York (1990) have declared the legislated objectives of public education in the state of Minnesota as progressive and beneficial to mainstreaming. The law states:

[T]he purpose of public education in Minnesota is to help all individuals acquire knowledge, skills, and positive attitudes toward self and others that will enable them to solve problems, think creatively, continue learning, and develop maximum potential for leading productive, fulfilling lives in a complex and changing society (p. 96).

Rhetoric aside, this law was passed in 1985 as a direct consequence of the deliberations of the Education Commission of the States, Task Force on Education for Economic Growth (1983), which produced one of the most influential reports to push for legislative and other reforms at the state level within the *A Nation at Risk* framework. Lipsky and Gartner (1989b) have quoted Hilliard, a mainstreaming advocate, as stating:

There is no special pedagogy for 'at-risk' students. The pedagogy that works for them is good for all students. Further, it is due to the fact that appropriate regular pedagogy was not provided to 'at-risk' students that they fail to achieve (p. 281).

While there is no doubt that an appropriate pedagogy for disadvantaged students (including students with disabilities) may be good for all students, the current arrangements of interagency collaboration do not appear to be for the benefit of disadvantaged students.

Lipsky and Gartner (1989b) are aware of CED's proposals with regard to disadvantaged students. They have mentioned the *Children in Need* publication and appear to accept its recommendations tacitly. They have insisted that special education should be "scrutinized" (p. 282) for the interests of all students. No connection or analysis, however, is made with reference to CED's ulterior motives or to the historical precedence of social control of special populations in which the business community was a prime participant. Instead, there is an accommodation of the discourse of the 1980s' reforms in the argument for merging regular and special education:

The American economy needs a well-educated work force, and the demographics of the future make it clear that it cannot be achieved if large portions of our population are discarded.

Persons with disabilities are increasingly asserting their entitlement to a full place in society.

Growing numbers of advocates and parents with children labeled as handicapped are recognizing that the PL 94-142 achievement of access to a separate system is not an adequate preparation for a full life.

The most recent school reform efforts manifest concern for the full range of students and demonstrate the capacity to effectively educate all students together (pp. 284-285).

This four point argument has incorporated the historical contradictions of special education and American education in general: striving for access and equality in a society which is economically driven. The overriding priority placed on economics, though, creates a web of relationships that in educational settings work to victimize and discriminate against people with disabilities and disadvantages. 'Purposeful' mainstreaming may become a chimera in this context because individuals are valued for their ability to produce goods, not for their intrinsic human qualities. Sapon-Shevin (1987) recognized this possibility in criticizing, even though not systematically, the connection made in the national education reports between 'excellence' and national economic growth. Mainstreaming advocates would probably benefit greatly by 'scrutinizing' more systematically the meaning of the 1980s' reforms.

Fourth, the intrusive arrangements of interagency collaboration will harm family cohesion and autonomy. All societies need a relatively stable basic unit of social organization. In many contemporary societies, including American society, the nuclear family is the basic unit of social organization (Haviland, 1990, pp. 242-267). Its structure and cohesion has been seriously affected during the last fifty years. While new forms of the nuclear family are emerging, such as single parent families, the attempt to strengthen the family by making it dependent on formal

institutions appears to be largely misguided. The family should have a considerable degree of autonomy, free of blatantly intrusive intervention, to make its own decisions as to the interdependency arrangements it wishes to have with other social units and institutions. Engineering intrusive provisions has a high potential for 'unintended' outcomes of family and social pathology.

Fifth, ahistoricity and a preoccupation of most American educators with narrow specificities may further contribute to confusion. Despite references of mainstreaming advocates to a more humanitarian society, most of mainstreaming advocates' actions are confined to procedural research and school-based intervention (see Chapter 6). While the promoted philosophy of inclusion and concern about students with disabilities appear to be genuine, there is little attempt in the 'purposeful' mainstreaming literature to connect special education to the general social context. It is this missing aspect that, if incorporated, may contribute to a strategic assessment of the situation and to meaningfully guided reform.

Wrapping Up: A Theoretical Perspective with Practical Implications

A suggested theoretical framework that might be helpful to educators, special educators, and advocates of mainstreaming to interpret issues might include the following: the analogy of the trees and the forest, a critical stance toward assumptions, the understanding of power relations, and the contrast between contractualist and substantialist philosophy in education. This theoretical framework has practical implications and is not intended for academic debates only. Theory and practice are connected much more than is currently thought, because it is ideas that are the origins of practice and not vice-versa. A 'practical' vision is no vision at all.

In *Conceptual Blockbusting*, James L. Adams (1974) discusses a number of basic thinking barriers to approaching issues and problem solving. He has classified them in five categories: constraining the problem too much, being unable to pay attention to or isolate the highest priority problem, being unable to think of more than one strategy to solve the problem, paying attention to the expected rather than the unusual, and saturating thought by too much data of varying importance. A useful analogy is the trees and the forest: the ability to distinguish between the trees and the forest and to interrelate the two. General and special education could be seen as trees and American society as the forest. The former do not function in vacuum. They have to be seen within the general social context and as the outcome of a long chain of historical processes and transformations. Utilizing this context will help in seeing the various units as interrelated parts of a whole, an approach that may advance understanding and strategic planning for short- and long-term change.

At the same time, it would be wise to maintain a critical stance toward assumptions because assumptions tend to slant world views. A critical stance would be necessary not only toward others' assumptions but also toward our own. Michael W. Apple (1990) has expressed the obstacles and the merits of this approach quite candidly:

There is nothing very odd about the fact that we usually do not focus on the basic sets of assumptions which we use. First, they are normally known only tacitly, remain unspoken, and are very difficult to formulate explicitly. Second, these basic rules are so much a part of us that they do not have to be expressed.... However, if we are to be true to the demands of rigorous analysis, it is a critical inquiry in to just such things as the routine grounds of our day to day experience that is demanded (p. 126).

In the rush to get things done, it is sometimes difficult to see that what is taken for granted has not always been so. The passage of time has the effect of obscuring the social construction of

practices, including practices in education, which come to be taken as the only course of action. One pertinent example is that in 'open' school environments, as Apple (1990) calls them, - that is the mainstream of education - the possibility of sorting, tracking, and social control becomes even greater if traditional functions (and objectives) of schooling are kept intact (pp. 141-142). This is so because the mainstream is much more subtle in its processes and under considerably less scrutiny than special education - certainly a pivotal factor that has to be kept in mind by mainstreaming advocates. Research and practice in mainstreaming (referring to the integration movement) and mainstream education, within the current social and educational conditions, have to be seen in light of who it is that they are likely to benefit or disadvantage.

An understanding of power relations may contribute to the illumination of these potential benefits and disadvantages. The educational reforms of the last few decades have been used by the federal and state governments and corporate business in a manner that splinters reality into disconnected issues when in actuality these issues are interconnected. Many professionals and educators have participated in this splintering out of complacency, ahistoricity, or self-interest. The popular idiom 'divide and rule' applies equally well to social groups, knowledge, and practice. Thomas S. Popkewitz (1991) has lamented these educational reforms for this very reason:

Debates rage about the relation of individuality to society, the importance of power in social knowledge, and the role of history in the construction of identity - all central concerns of contemporary scholarship. And yet, the language of reform ignores these fundamental issues and, in their place, offers discourse that fragments reality and reifies social existence (p. 160).

Brown and Comola (1991) have differentiated between 'political' power and 'ethical' power. The former, they suggest, accomplishes its goals by "pressure and manipulation" but the

latter by "communication and understanding". Consequently, the two forms of power are "mutually exclusive" and cannot be used simultaneously (p. 94). Despite being very much in favor of the 1980s' reforms, they have scathingly criticized the two groups that primarily directed them for a 'political' rather than 'ethical' approach to power:

We must never forget that all power can be justified in some manner and is usually justified by an appeal for excellence. The invocation of motivation, progress, aggressive management, and the public good have all been used as excuses for usurpation of power in both government and business....There is little need to catalog the lists of fraudulent activities in savings and loans, Wall Street activity, car dealers, and others to document the statement. Perusal of the daily papers should suffice (p. 94).

Yet, as the result of educational reforms during the last decade, power relations have been dramatically altered in the United States. State power, according to Popkewitz (1991), is no longer just the sum of government agencies and regulations. It is rather interactions among "[g]overnmental agencies and nongovernmental organizations of professional groups, universities, philanthropic foundations, national businesses, and teacher unions [which] interact as elements in the production of social regulation" (p. 125). These interactions under the steering of the federal government have limited both the interests represented and the extent to which participants define educational problems and solutions (p. 215). While promulgating 'deregulation' the federal government and closely allied corporate-business interests have succeeded in increasing their regulatory power. And they have succeeded by making the new power relations hardly visible. In this sense, interagency collaboration is implicated as an invisible form of social control under the guise of 'help'.

Under these conditions it is likely that special education and mainstream education will come to espouse a 'contractualist' rather than 'substantialist' ideology, terms Carrier (1986)

applied to education in relation to special education. According to contractualism all children are "unique individuals - with individual differences no doubt, but not classifiable as different types or sorts" (p. 291). For this reason, contractual systems would tend to provide education tailored to the needs of the individual student by designing appropriately geared instruction and programs - a child centered pedagogy. Contractualism sounds very similar to the pronouncements of many mainstreaming advocates that 'all children have special needs'. If individual differences are interpreted as different interests, then contractualism would probably be egalitarian but if comprehended as difference in ability it would likely be inegalitarian. According to substantialism, the vast majority of children can learn while a very small minority does not have the ability to learn. The latter are segregated but their number is so small that substantialism, in this case, is considered to be egalitarian. If, however, the number of children excluded from school begins to grow then substantialism becomes inegalitarian (Carrier, 1986).

Carrier (1986) sees contractualism as a consequence of certain values and practices in U.S. society and culture, in that performance and ability to earn a wage and create surplus value are highly appreciated individual characteristics. Those who have problems performing and creating wealth are then targeted for amelioration. He describes American education as ascribing to a substantialist point of view until the end of the nineteenth century. Beginning in early twentieth century, it increasingly started becoming contractualist because of increasing enrollments. As the move to contractualism was leisurely and irregular, American education retained many of the elements of substantialism. The result was segregated special education for those students classified as disabled - an "artifact" (p. 307) of meshed contractualist and substantialist elements in the philosophy of American educators. Carrier's prediction is that as

the values of capitalism become more pronounced in schools the outcome may be a merged regular and special education with "sorting...occur[ing] openly in the main classroom" (p. 307).

If this prediction is accurate, and there is strong evidence to suggest that it is, then the mainstreaming movement would benefit from reflecting on the educational processes of which it is part. The invocations of various groups to educate all children from CED, the federal government through reports by the Office of Special Education of the U.S. Department of Education (e.g. Will, 1986) to mainstreaming advocates have a common ground. The main obstacle is a substantialist mentality ingrained in the minds of many educators.

What kind of mainstreaming is it going to be? If the concept of society as primarily an economic entity is maintained in the U.S., and there is no reason to believe that it will change soon, it is very probable that it will be mainstreaming built on massive compromises. It will be mainstreaming based on a contractualism that interprets individual differences more as differences in ability than in interests. The targeting of disadvantaged students and their families, an estimated 30% to 40% of the U.S. student population, for amelioration in the mainstream of education makes the compromise even more controversial. Given the historical evidence, the element of social control inherent in the currently developing model of interagency collaboration will probably outlast its twin element of 'help'.

Alternatives to this scenario, though, are possible. They depend on the vision and willingness of American educators and the larger society to go beyond the 'practical' and beyond the usual or expected. They depend on the fundamental nature of society American citizens wish for themselves. An alternative suggestion is offered in the following and final chapter.

CHAPTER 9

Summary and Conclusions

The loss of ignorance is an essential step in all of our efforts to create and maintain institutions which sensitively and effectively serve humankind (Goodlad, 1984, p. 270).

This investigation has been an exploratory study to examine the obstacles to and prospects of 'purposeful' mainstreaming in light of the social-historical context of the United States during the last two centuries. Four components were included. First, special education was situated in the context of general formal U.S. education and society. Second, the objectives of public schools were historically situated to see how they have influenced the development of special education over time. Third, there was an examination of the outcomes of PL 94-142. Fourth, the meaning of the 1980s' 'excellence' educational reforms was scrutinized.

It was postulated that a social-historical context would render opportunities for theory-building and for facilitating meaningful planning to enhance 'purposeful' mainstreaming. It should be stated here that this is not a conspiracy theory but simply an observation of trends, some of which have been thoroughly documented in earlier historical and social science research. A summary of the findings and conclusions is given below, followed by an alternative view of integrated education and suggestions for future research.

Question 1: How does special education fit into the general context of American public formal education and society over the last two hundred years?

The definition of American society as primarily an economic entity has its roots in the late colonial era. After the Revolution, this definition, in combination with the infusion of Anglo-Protestant values in the general social order and emerging industrialization and urbanization, began to become increasingly pronounced. Economics have greatly driven the operation and structuring of American society as well as the objectives of public schools. In fact, most of these objectives have been the direct outcome of this definition by emphasizing utilitarianism which has become the defining characteristic of educational reform since the end of World War II. The emphasis on science, mathematics, and technology in the 1980s appears to be the logical conclusion of society as an economic entity. In combination with a climate of prejudice and intolerance toward various differing cultural and minority groups over the years, this definition has influenced the way American society has viewed and treated social groups that could not or would not contribute to economic growth. The treatment of these groups is described below.

During the colonial era individuals with disabilities, the poor, and other dependents were taken care of in the community. Beginning in early nineteenth century, however, the institutional ethic for 'needy' populations supplanted the community ethic in American society. Paupers, dependents, the poor, immigrants, deviants, and various minorities were targeted. Some argued that all these social groups needed help while others perceived them as threats to social stability, prosperity, and American democracy. Poorhouses, almshouses, houses of refuge, reformatories, and asylums were established. The intentions incorporated relief, education, and social control. Despite a publicly declared familial ideology, segregation and regimentation were practiced. By the Civil War, these contradictions had been resolved in favor of social control.

Starting approximately in midnineteenth century, and concurrently with the increasing momentum for establishing common schools, arguments were made in support of training schools for the 'feeble-minded'. Most of the individuals identified as 'feeble-minded' had immigrant, socioeconomically poor, or minority backgrounds. By the turn of the century many training schools existed across the country modeled on the previous wave of institutional creation. The intentions again were relief, educational remediation, and social control. The development of intelligence testing and the classification of large numbers of both the student and the general American population as 'feeble-minded' propelled a new wave of panic that American democracy, prosperity, and social stability were endangered. Since the 'feeble-minded' and deviants were perceived as an identical group and responsible for all social problems, immigration restrictions were placed on ethnic groups 'breeding' inferior intelligence, eugenicists succeeded in their lobbying for adopting laws restricting civil rights such as procreation and voting, and special education programs were set up in schools for separate education. The intention of social control had at that point displaced educational remediation to a considerable degree. Intelligence testing was used for identifying and classifying 'feeble-minded' individuals and for vocational tracking purposes. Beginning in the 1930s, special education programs started to grow dramatically. Only 0.62% of the public schools population was enrolled in special education programs in 1932 compared to 11.30% in 1988-89.

Since the 1960s the disadvantaged (immigrants primarily from the third world, various minorities, students with disabilities, poor families including single parent families mainly headed by women, teenage parents and their children, and students in inner-city schools), a proportion of 30% to 40% of the student population, have attracted attention. Based on historical experience,

close correspondence of targeted groups, and similarity of social conditions with the two historical precedents (major historical transition period, economic restructuring, new wave of immigration, social and economic dislocation, reform of general public education), it seems that the disadvantaged are the target of a new wave of special education reform having two intentions: educational and social remediation and social control. It appears that school-based interagency collaboration will be the most likely candidate system to be chosen on a massive scale.

In conclusion, it appears that there have been three waves of reform to establish or reform institutional arrangements for special populations in the United States. In the two most recent cases targeting the 'feeble-minded' and the disadvantaged respectively, special education has functioned as a residual option of mainstream American education and has had the double intention of educational remediation and social control. Since the social control function has outlived the educational remediation function in the first two waves, it is predicted that this will likely be the case in interagency collaboration arrangements currently being developed.

Question 2: How have the objectives of American public formal education influenced the development of special education over the last two hundred years?

Public schools in the U.S. have often been a ground of controversy among various social groups that have tried to use public education for their own and frequently opposing goals. The objectives of public education appear to be quite consistent over time: a common American culture, republicanism, nationalism-patriotism, training of a disciplined work force for the economic realities of each era, literacy and knowledge, social control and order, social mobility, and since World War II technological and military supremacy.

A consequence of most of these objectives was the segregation of children with disabilities into institutions, special schools, or special classes. The emphases on a common American culture, social control and order, a sometimes irrational nationalism-patriotism, and the individual as a unit of productivity implied that the students most often classified as disabled would be coming from poor and from culturally, racially, linguistically, or ethnically different families. Many of these students were directed into the vocational tracking system devised at the turn of the century. Special education may be seen as the bottom of the tracking ladder meant for students who do not conform to the conventions of schooling life or the view of the individual as a productivity unit.

The substantialist mentality ingrained in the practices of schooling has created a situation where 'pull out' programs are seen by many educators as almost unquestionable activities. Their social construction has long been forgotten in the process of reification. From the point of view of an outside observer, it would appear that practicing remediation through 'pull out' programs has itself become an objective of U.S. public education.

Question 3: What have been the outcomes of PL 94-142 for students with disabilities until 1990?

Public Law 94-142 (succeeded by PL 101-476 in 1990) requires the placement of children with disabilities in the least restrictive environment. However, it also mandates the existence of the whole continuum of services from the least to the most restrictive environments. Its outcomes have so far been contradictory. On the positive side, parents of students with disabilities have gained the right to due process and to challenging perceived improper placements. On the negative side, the ensuing bureaucracy has made parents and students with disabilities more

dependent on professional authority. The law has also contributed to the expansion of the special student population, especially the learning disability category, by providing funding and incentives for identification and categorical classification of students in the official disability categories.

The placement patterns of students with disabilities are an indication that the law has failed to meet its least restrictive placement requirement. At the national level, the overall placement patterns of the special population as a single group have remained virtually unchanged since its enactment (see **Tables 9, 10, 11 and 12**), whereas considerable variability exists at the state level (see **Tables 13 and 14**). Based on this information, it seems that PL 94-142 and its successor PL 101-476 are continuations of previous federal legislation regarding children with disabilities rather than a break with the past.

Question 4: What is the meaning of the 1980s' 'excellence' reforms and some of its preliminary outcomes?

The reforms of the 1980s may be seen as part of the efforts by the federal government and corporate business, since the end of World War II, to adapt their patterns of authority and social control to the changing political, economic, and social realities. Most of the educational reports on the condition of formal schooling were heavily influenced by the corporate model of schools. The hidden intentions of the reports were to engineer consensus, switch the blame for economic problems from business management decisions to public schools, reopen discussion on the role of government and business in education, and to refocus educational issues from social equality and justice to the economy. These intentions appear to have been quite successful.

The discourse of the reports narrowed the educational agenda and the represented interests, disconnected issues from their social origins, and confined the problem-solving process of social issues within the context of schools. In this process, decision making was further centralized, the actual implementation of reforms contradicted many of the 'quality' schooling rhetoric, schools were closely linked with business through partnerships and correspondingly geared curricula, and the foundations were laid for basing the model of teacher professionalization on compatible terms with state and corporate-business interests.

The scope of reforms seems to indicate that government and corporate-business policy makers have extensively employed social science for future planning. They appear to have a thorough understanding of social trends, prospects of social change, public manipulation strategies, and power brokering. Both the federal government and corporate business have manifested a proficiency to plan for structural and procedural change. Structurally, the federal government, with the assistance of corporate business, has directed the steering of the educational agenda. Localities have implemented the reforms under the monitoring of state governments and business leaders involved in school-business partnerships, compacts, and collaboratives. Procedurally, the decontextualization of educational problems from their social context, the 'worker' student model, teacher professionalization, standardized accountability measures, and the stress on science, mathematics, and technology subjects have been utilized to promote this educational agenda.

Of particular interest are the corporate-business recommendations of early prevention and intervention programs for the disadvantaged of whom business leaders have become self-proclaimed 'primary advocates'. These recommendations have suggested sustained intervention

in the lives of disadvantaged children and their families, encompassing the developmental stages of children from birth or early childhood to young adulthood. These recommendations and the most likely mode of implementation, interagency collaboration, have been adopted without any major modifications by most American educators. The implications of these reforms do not appear very encouraging for disadvantaged students. Some disadvantaged students and families may profit from interagency intervention but it is more probable, given the historical precedent of the first two waves of special education arrangements, that most of them will not. Despite the humanitarian discourse of these reforms the disadvantaged have been factored into the equation of structural and procedural educational reforms as potential deviants to be controlled.

Question 5: What are the obstacles to and prospects for 'purposeful' mainstreaming in light of the above?

Almost all the barriers mentioned in mainstreaming literature are school bound. Funding and classification patterns, the dichotomy between regular and special education, school organization and routines, teacher resistance and teacher preparation programs, opposing court decisions, professional authority powers, or lack of adequate support for teachers and students with disabilities are some of them and are formidable obstacles indeed. When viewed in the social context of American society, however, they may be seen as symptoms rather than the causes of exclusion of students with disabilities. The origins of this exclusion are the objectives of formal education and more general societal considerations and priorities. The definition of American society as an economic entity has largely geared public education objectives which in turn have entrenched a substantialist, 'pull out' approach to students with disabilities.

The influence of this definition is rather transparent in the 1980s' educational reforms. Corporate business and the federal government have campaigned to further entrench the view of schools as preparatory ground for the world of work. Schools are now closer to the model of the 'free market' economy: attracting larger school 'market shares' or going bankrupt, viewing administrators as business executives, and basing its participant model (teachers and students) on the 'collaborative worker' model. An adjunct ingredient of this model is interagency collaboration, which from the point of view of corporate business and government would be an effective method of social control for the disadvantaged section of the American population.

From the point of view of mainstreaming advocates, nevertheless, collaboration would be an effective way of integrating students with disabilities into society. This undoubtedly represents another contradiction in American education: different groups trying to use schools (and perhaps mainstreaming) for quite conflicting purposes. The larger social context appears to be favorable to the groups whose hidden intention is social control. If the mainstreaming literature is any representative indication, many mainstreaming advocates seem to be confused with regard to the intent and process of collaboration. Social controllers endorse collaboration with the intent of social control of the disadvantaged, whereas mainstreaming advocates support collaboration with the intent of genuine integration of students with disabilities into society. The adoption of the same process model by both is by no means equivalent to similarity of intentions, because similar processes may be used to achieve antithetical aims.

The prospects of the mainstreaming movement appear to be quite challenging given that the cards are stacked against it. This may not be apparent at present, nor will it become obvious in the next few years. As Timpane and McNeill (1991) have advised CED, the "results

of...[school reform] efforts [for at risk children] may not be clearly visible for a generation" (p. 32). Once such reforms have been entrenched in schools, however, it may be an overwhelming task to deconstruct them. Students with disabilities may find themselves in a situation very similar to thirty or forty years ago: trying to shake off what Gartner and Joe (1987) have called 'disabling images'. At the same time, there is a unique opportunity for mainstreaming advocates to utilize historical experience to unmask the hidden meaning of current educational reforms. It is by no means an easy task and there is no guarantee of success but it may plant some of the seeds for more beneficial reforms in the future. Perhaps the most important ingredients may prove to be historicity and the commitment to long-term persistence.

Recent Developments

The funding and dependency (or autonomy) patterns of educational institutions on government and other powerful social groups are influential in determining educational intent, objectives, practices, and outcomes. They define to a large extent the purposes of schools, the kind of education received by students, the instructional and organizational arrangements practiced in schools, and the actual results of all these efforts. It is in this context that recent developments are discussed.

The October 1992 edition of *Phi Delta Kappan* featured two articles of then presidential contenders George Bush (1992) and Bill Clinton (1992) delineating their positions on educational reform. The two plans, as stated, are quite similar. They both advocate 'free-choice' and repeat the usual rhetoric about local school control and the importance of schools in promoting competitiveness, demanding 'excellence', enhancing social mobility, and maintaining democracy

and social order. Cuban (1992) has pointed out to the similarity of these educational plans and the illusion of solving social problems, whose origins are not rooted in schools, within a school context. There is only one deceptively 'major' difference: George Bush advocates a voucher plan for 'free-choice' schooling either in private or public schools, while Bill Clinton supports 'free-choice' within public schools only. Corporate business has been a prime advocate of the recent versions of 'free-choice' (CED, Research and Policy Committee, 1985, pp. 28-29; Jaeger, 1992). Judging from Toch's (1991, pp. 246-263) review of both version outcomes over the last few years the results have not been positive. Giroux (1992) has heavily criticized Bush's 'America 2000' as an "elitist view of schooling" (p. 5) that would divide students along poor and affluent income lines.

Nevertheless, there is more to point out to than that. Neither of the two versions really are 'free-choice' schooling. The term seems to be just a buzzword that distracts attention from the issue that the steering intentions and functions of the federal government and corporate business leave little room to the vast majority of American citizens for substantial free-choice. In Bush's plan schools would probably be divided, in general with very few exceptions, along first-rate private schools and second-rate public schools, hardly an egalitarian system. This is so because the voucher plan for private schools covers only part of the costs, effectively preventing lower income parents from sending their children to private schools, while subsidizing the education of more affluent families who can afford it anyway. The outcome would be a redirection of badly needed funds from public to private schools for those who need it the least.

The plan of Bill Clinton, the new president of the United States as of January 1993, does not appear to be substantially better. Most public schools are geared toward the 'world of work'

effectively interfering with the efforts of students whose interests are neither in the sciences and mathematics nor in technological areas. In the case of the disadvantaged, apart from some safety benefits for a few inner-city students who might elect to attend suburban schools, there also would likely be no real free-choice. Interagency collaboration arrangements may still target disadvantaged students no matter what school they decide to attend. Besides, what would happen to the already battered sense of community if neighborhood children are sent to different schools?

An Alternative View of Integrated Education

A free-choice that is substantial and not just a slogan would involve efforts to keep a community together. It would involve full voucher plans, covering all expenses, that are given to the local community without strings attached by the federal or state governments (except perhaps for nondiscriminatory clauses). It would involve giving communities full discretion to make their own educational arrangements through open and honest consensus. It would involve situating education in the real world of the community and not just the 'world of work'. In summary, it would involve a real, substantial decentralization of decision making as a conscious plan to develop 'caring' communities for all students.

All these ideas have already been suggested in some form or another by mainstreaming advocates in their calls for 'community-based integration' and 'caring communities', which in reality would represent the integration of all students in the community. They may seem utopian and unrealistic but they existed in America's own backyard during the colonial era and early nineteenth century. Jane Addams, one of the leaders of progressive education in the twentieth

century. argued that the educative functions should reside in the community itself (A. F. Davis, 1973; Lagemann, 1985).

Stainback and Stainback (1990b) have asserted that the key to inclusive schooling is the 'willingness' of society to encourage educational 'flexibility'. Educational flexibility presupposes flexibility of the social institutions in which it takes place. Social institutions may be viewed as existing on a flexibility-rigidity continuum.

Perhaps the most flexible social institution is the family. Douglas Biklen (1992) in *Schooling Without Labels* has described how the families he studied approach their children with the "intention of inquiring" (p. 48). This approach offered the opportunity for a dialogue from which both parties learned about each others' needs and behavior. The consequence was practices of accommodation instead of practices of pathological labeling and exclusion.

New Right groups have declared that the family has lost too many of its functions to schools and other formal agencies and that it should reclaim some of them (e.g. Heritage Foundation, 1984). Paradoxically, they have politically supported those (federal and state governments and corporate business) who have designed reforms whose outcome will probably result in the further weakening of the family. Despite this paradox their criticism appears to be valid. The family, in whichever of its emerging forms, should be strengthened - not by intervention but by increased autonomy to make its own decisions including the education of its disabled members.

The community is the next level on the flexibility continuum. While more rigid than the family, the social institution of the community still possesses a wide range of flexibility opportunities. If schools are controlled by the community in substance, and not superficially, then

they can fulfil the integration of all students in the school and in the community. These schools would have as an objective education rather than just schooling; the two "are not synonymous" as Goodlad (1984, p. 322) has suggested. It is in this context that family and school collaboration will benefit students with disabilities by equality of authority between parents and professionals, in contrast to the overwhelming authority of professionals in current schools.

Formal institutions such as existing schools are the other side of the flexibility-rigidity continuum. The more formalized human behavior becomes, the more rigid the parameters in which participants may make choices and the more the chances of reifying (or taking for granted) assumptions and practices (Berger & Luckmann, 1966). Illich's (1970) suggestion that society should be 'deschooled' was made in this framework and is as relevant as ever. Formal institutionalization of human activity progressively rigidifies practices and their assumptions. Existing schools as formal social institutions are no exception. A pertinent example is PL 94-142 which, despite some intentions for educational flexibility, ended up in creating a rigid, bureaucratic maze.

Flexibility also requires that the objectives of schools are less based on economic priorities. This implies that the definition of society as an economic entity will have to undergo considerable modification - an enterprise that will demand major changes in the way American society views and operates itself. This is probably the basis on which 'caring' communities may be built and sustained. American society will have to redefine its priorities to accommodate cultural and other differences, to seek genuine cooperation among its citizens for the common good and not just the select few, and to make conscious choices about the fundamental values it wishes to espouse. In the words of Lipsky and Gartner (1989b), American citizens will have

to ask themselves: "What values do we honor? What kind of people are we? What kind of society do we wish to build, for ourselves and for all our children?" (p. 285).

Part of this endeavor would be the 'scrutinization' of special education "despite the fears of some that the findings will be dismal and may threaten hard won current programs. Indeed, the presence of this fear is all the more reason to undertake such scrutiny" (Lipsky & Gartner, 1989b, p. 282). In this scrutinizing, a vision that combines holistic views of educational reform as connected to general social issues would be crucial. While present efforts to reform the education system at the school level should be continued, it would be to the long-term benefit of students with disabilities to keep in mind how they fit in the wider social framework. Historicity, a critical stance toward all issues, and an understanding of power relations have the potential to be powerful guides in examining the larger picture and in advising on social and educational reforms for the authentic interests of all students.

Suggestions for Further Research

A number of recommendations for future research follows from the present investigation. It is suggested that such research be conducted in a social and historical context. First, the meaning of state variability with regard to the educational placements of students with disabilities needs to be studied. Why have some states adopted less restrictive environments, while others more restrictive ones? Do the former represent substantial change? Second, the role of CED and other prominent business organizations in educational reforms requires more detailed attention. Third, interagency collaboration appears to be a research target of prime importance for the mainstreaming movement. Research in this area may help to pinpoint the contradictions between

the stated intentions of interagency collaboration and its actual outcomes. Fourth, the impact of the 1980s' 'excellence' reforms on the students identified as 'gifted' needs to be examined. Ironically, it is not only disadvantaged students who may be at risk because of targeting by interagency collaboration. A number of 'gifted' students may be at risk as well because of the emphasis of reforms in science, mathematics, technology, and the 'world of work'. Those whose interests are in the arts and the humanities - areas of the school curriculum that will likely be neglected even more in the future - may be in danger of being mislabeled as 'low achievers' or 'behavior problems'. Fifth, comparative studies in other countries may reveal similarities and differences with the U.S. case. They may put in perspective the way in which differing or similar social contexts influence general, special education, and mainstreaming practices.

Concluding Words

This exploratory investigation situated special education and mainstreaming in the social-historical context of U.S. general formal public education and society from the American Revolution to 1990. Its main purpose was to examine the obstacles to and prospects for 'purposeful' mainstreaming in this wider context.

The following were the main findings: (1) the concept of 'society as primarily an economic entity' has largely influenced the objectives of U.S. formal public education and the philosophy and practices of special education; (2) special education has primarily fulfilled the functions of social-educational amelioration and social control; (3) there have been three major waves of reform with regard to special education arrangements in U.S. history - in the first two waves the intention of social control outlasted the intent of social-educational remediation; (4)

the most recent wave of special education reform, led predominately by the federal government and corporate business and targeting disadvantaged students (students with disabilities are one of the constituent groups) and their families, commenced in the 1960s; (5) the main model of reform for the latest wave seems to be 'interagency collaboration' which has inherent elements of social-educational amelioration and social control.

The implications of these findings for 'purposeful' mainstreaming are several. First, it is predicted, based on historical precedent and initial indications, that the long-term outcome of 'interagency collaboration' may be social control of the disadvantaged section of the American population. Second, there is evidence to suggest that confusion on the part of mainstreaming advocates between process (collaboration) and intent (social control versus integration) may be a real possibility as 'interagency collaboration' and 'networking' or 'professional collaboration' are similar process models. The former is predominately advocated by government and corporate business as a potentially effective method of social control. The latter is promoted by mainstreaming advocates as an effective method of integration of students with disabilities. Similarity of process does not necessarily imply similarity of intent as comparable processes may be used to achieve opposite purposes. It is suggested that mainstreaming and special education be situated in the wider social-historical context of the U.S. society for strategic planning and more meaningful reform.

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