



Leading for All

Executive Summary

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The Code Special Education Project

Introduction

For almost a decade, the Canadian province of Ontario has undertaken a sweeping educational reform agenda that has attracted growing international attention and acclaim. Although Ontario's reforms have been widely and prominently reported by educators who have been involved with them, and while the province's achievements have been highlighted by influential international organizations such as the Organization for Economic Cooperation and Development and McKinsey & Company, there has been very little independent research on the nature of the province's educational reform efforts or their effects.

The best-known parts of Ontario's educational reform agenda have been its concentration on raising the bar and narrowing the achievement gap in tested literacy and numeracy, and on increasing the rates of high school completion. An important, but less well-known part of this agenda, that intersects closely with the focus on literacy and numeracy, has been a distinctive approach to reform that has been specifically and most ostensibly concerned with bringing about improvements for the province's highly diverse student population, including but not restricted to those with formally identified special educational needs. Ultimately, these reforms, designed to benefit students with special educational needs, have also turned out to have an impact on all students and their teachers in school systems across the province.

This report presents the background, structure, results and recommendations arising from a two-and-a-half year study of this significant reform initiative in Ontario. In view of Ontario's high profile in global education discussions, an independent, research-based investigation of any aspect of its education strategy should be of interest not only to the province itself but also to any system that is designing, launching or evaluating an education reform effort. However, the present study is of particular interest because of the unique reform architecture and implementation strategies that have characterized the province's initiative.

Early in 2005, the Ontario Ministry of Education published a report titled *Education for All* that presented seven guiding principles for more fully educating students with identified special needs. Based on the findings and recommendations of an expert panel, the report sought to "assist teachers in helping all of Ontario's students learn, including those students whose abilities make it difficult for them to achieve their grade level expectations". In May 2005, the Ontario Ministry of Education allocated \$25 million to the Council of Ontario Directors of Education (CODE) to develop and implement a plan to support the recommendations in *Education for All*.

At the start of the project, the CODE leadership team made some key decisions: All boards would be invited to participate, but they would have to submit (and have approved) a proposal that detailed their plans. Although they were accorded considerable flexibility in their choice of a target population and the strategy to be followed, the boards had to show how their plans were consistent with the principles of Education for All. Equally important, each board would receive an equal amount of funding irrespective of its size. The notion was that this money should be used to fund a pilot project that could then be continued with the boards' own support. Although some of the larger boards were initially critical of this approach, it did build considerable political support among the directors of the much larger number of small boards and, therefore, also built political and professional capital of commitment and advocacy for this change among a critical mass of Ontario's school board leaders.

The CODE leadership team, together with a cadre of experienced high-level educators, provided support to the boards during the proposal preparation process and throughout the life of the initiative. The resulting ensemble of projects came to be called Essential for Some, Good for All (ESGA) and, ultimately, all 72 boards in the province participated. Although the original intention and impression was that there would only be one year of funding, eventually it transpired that there would be three years of funding with a total amount of \$57 million. The principle of equal funding irrespective of the size of the board, was continued in the subsequent two years.

At the conclusion of the project in 2009, CODE officials approached Professors Andy Hargreaves and Henry Braun of Boston College to conduct a review of the project that would involve a sample of the boards in the province. An invitation to participate was issued to all 72 school boards, with the proviso that they would have to fund their own involvement. Ten boards – almost a seventh of those in the province – opted to participate.

Significance

In global terms, ESGA is a remarkable and unique systemic educational reform strategy. It took the hitherto often marginalized area of special education and created a change design that would impact the education of students and the work of their teachers across the whole system. It steered change from the middle instead of only supporting it from the bottom or driving it from the top. In ESGA, change was driven by building a commitment to passionately shared beliefs that transformed practice as much as and arguably more than by pushing people into new practices as a way to change their beliefs. It created internal coherence within the initiative itself as well as external coherence in relation to other reform initiatives through shared beliefs and constant interaction among participants and their leaders, more than through paper procedures and bureaucratic alignment. And instead of expecting boards to adopt uniform responses to a centralized reform strategy, ESGA generated and harnessed local creativity and energy in order to respond flexibly to the diversity of local needs and circumstances. Essentially, ESGA was more about reculturing the beliefs and collaborative working practices of a profession than about restructuring the formal roles and responsibilities within the system. Its approach to sustainability, premised on the initial assumption that there would be only one-year of funding, was also unusual: to make a one-time change in a way that would produce benefits that would last a lifetime.

In short, in its focus on all students and in its engagement of all professionals, ESGA's origins and architecture enshrine the philosophy articulated by a special education superintendent in relation to her own board's students: "We meet them where they are and move them forward."



Research Goals

In collaboration with both the CODE leadership team and representatives of the ten participating boards, three research goals were established for the review:

- To understand and articulate the architecture and design of the ESGA project and its undergirding theory of action, so that both can be communicated clearly to participating boards and diffused more effectively to other jurisdictions in Ontario and worldwide;
- To gather perceptions of the ESGA projects' strengths and limitations, impact and effectiveness from samples of individuals and focus groups who participated in the project and whose boards possess different characteristics and exemplify different approaches to project design and implementation;
- To connect these findings to an analysis of the existing evidence base of measured student achievement (local assessments and the provincial test of EQAO), in order to determine associations between variations in the intervention model and the conditions of implementation on the one hand, and student achievement results on the other.



Methodology

The review was conducted through a combination of appreciative inquiry and critical friendship. In that spirit, at every step, the review process was fully collaborative, with frequent meetings or phone conferences between the research team and representatives of CODE and the ten boards. At the same time, the Boston College research team took full responsibility for the conduct of the review and the contents of the final report. In view of the complexity of the initiative, a mixed methods research approach was used to address the study's research goals. In particular, a convergence triangulation design was employed, in which quantitative and qualitative data are first collected and analyzed separately on the same phenomenon, and then the results are converged by comparing and contrasting them during the interpretation stage.

This in-depth, mixed methods review triangulates the responses from different levels and perspectives and provides one of the deepest and richest investigations of Ontario's educational reform in general, and special educational reform in particular, over the past decade. Large-scale reforms such as the one investigated here are complex in their design, and are often not fully clear to individuals who participate in or attempt to implement them. By taking a mixed-methods, multifaceted approach, both the complexity and the coherence of an initiative's design become more apparent when the initiative is viewed at different levels and from different perspectives.

Research sample

Although the research sample of ten school boards is self-selected, the boards broadly represent Ontario's diversity with respect to size, geographic and demographic variation, and other opportunities and challenges. Nine of the ten boards are located in Ontario's main population corridor, from Windsor through metropolitan Toronto to Ottawa. One board is located in the far northwest. In size, they range from one of the largest boards in the province to one of the smallest. Some of the boards are more urban and reasonably compact, and others are more rural and extend over hundreds of kilometers.

For many purposes, Ontario school boards are organized into three sectors: Public (English), Catholic (English), and Franco-Ontarian. The study sample contains 5 Public (English) boards, 4 Catholic (English) boards and one Franco-Ontarian board. Based on comparisons of grade 3 results in reading and writing in the province-wide test administered by the Educational Quality and Accountability Office (EQAO), prior to ESGA the study boards were quite similar as a group to the non-participating boards in the same sector with respect to the overall percentages of students meeting or exceeding the provincial standards. This similarity extends to the proportions of students identified with special needs and also to the percentages of those students who met or exceeded the provincial standards.

Qualitative Data Collection and Analysis

The research team conducted 3-day site visits at each participating board, involving at least one of the principal investigators and from one to three research assistants. Interview data were obtained through one-hour, semi-structured, digitally-recorded interviews with board staff (e.g. superintendents), principals, Special Education Resource Teachers, coaches, teachers, and other educators working at the schools and boards. In the course of each site visit, the project team spent a half-day at each of two schools, touring the facility and interviewing professional staff individually and in focus group interviews and discussions. Other sources of evidence included media reports, curriculum documents, teaching resources, photographs, websites, and existing compilations of achievement data.

The interview data were transcribed, categorized, and then analyzed using the constant comparative method. Following each site visit, a comprehensive case study was drafted and then underwent member checks, as all research participants were invited to review and comment on the case report. Further comments and checks by members of the Boston College research team led to another draft that was again reviewed by the board staff. To facilitate this second stage of review, each case report was organized using the same framework: executive summary, context, CODE project overview, project participants, implementation strategy, outcomes and project reflection.

Following completion of the site visits, one of the principal investigators, together with a research assistant, conducted interviews with provincial education leaders and policy makers. On other occasions, interviews were conducted with the CODE leadership team. A process similar to the one described above was carried out, resulting in an 11th case study report.

Quantitative Data Collection and Analysis

To supplement the school-level investigations, a web-based survey was subsequently administered to school staff in a sample of schools in nine of the ten participating boards in order to elicit a wider range of data concerning participants' perspectives on the ESGA project's design and intent, as well as information about the context in which the participants did their work. The ESGA leadership team provided feedback on an early draft of the questionnaire. The primary contact in each board helped to customize the survey so that the terms related to ESGA would be familiar to staff in the board. In consultation with the primary contact person in each board, the project team decided on the schools to be included in the survey, with the key criterion being that the schools concerned had some degree of involvement with ESGA. The number of schools selected varied from board to board. The survey was administered through Qualtrix.

The questionnaire was organized into three sets of questions that:

- elicited the respondent's demographic information and professional experience;
- related to various aspects of ESGA, with selected response options (e.g., strongly disagree → strongly agree);
- probed more complex issues, allowing free-form open-ended responses.

The responses to the questions associated with the selected response options were aggregated to the board level and displayed in both tabular and graphical formats. The open-ended responses were evaluated using text-recognition software, responses were appropriately grouped and samples of characteristic responses were incorporated into the final report.

Interpretive Analysis

After the boards had approved their case studies, and in order to conduct higher level analyses, the research team then generated six cross-case reports, each one focusing on a specific theme. The cross-case reports provide a basis for generalizability of findings in terms of deepening understanding and explanation through an examination of the similarities and differences across boards. The six themes are:

- Curriculum and Pedagogy
- Assistive Technology
- Professional Culture, Capital and Development
- Cultures of Data Use
- Responsive Diversity Practices
- Inclusion and Accountability

A similar process took place with regard to interviews with ten senior policy makers connected with the project – former and current deputy Ministers and their Assistants, Ministry staff with high level responsibility for special education, and system leaders who had been responsible for designing, developing and implementing the project initiative.

Ethical Considerations

The review was undertaken in full compliance with the regulations and guidelines of the Boston College Institutional Review Board (IRB). Both the interview protocol and the web survey instrument were approved by the IRB. All participants at the site visits signed informed consent forms before taking part in the interviews, and were given an opportunity to review the draft case studies that were prepared following the visits. Participants in the web survey were presented with an initial screen that displayed an informed consent statement. In all cases, the informed consent statement made it clear that participation was entirely voluntary and that there were no consequences attached to a decision not to participate. Care has been taken to offer maximum anonymity to the participating boards and to individuals within those boards. Some very senior policy makers and system leaders are identifiable because of specific quotes that connect them clearly to particular initiatives, and in these cases they have been included by name with their full consent after having reviewed the parts of the report that directly concern them.

Limitations

In this case, as in other reform environments, there are significant challenges in inferring causal linkages between a particular policy and a specific set of outcomes. First, because boards were given considerable latitude in choosing grades, students and schools to target in the ESGA initiative, within the parameters of the K-6 focus of *Education for All*, it was often difficult to identify the “treatment group” and an appropriate comparison group for a given year, or to isolate the relevant EQAO data for any particular group. Second, boards were engaged in a number of initiatives simultaneously, so that isolating the impact of ESGA or, indeed, of any other initiative on achievement results, was not possible. This overlap with other initiatives was a deliberate design feature of ESGA’s architecture of change. Together, these aspects of ESGA make it very difficult and often impossible to provide direct responses to the study’s third research question concerning the effects of ESGA on student achievement results in each board.

Architecture

Education for All was a call to action on many dimensions, but had no specific targets. It was, therefore, difficult to drive through the system in a top-down manner. Thus, the Ministry's decision to assign responsibility and authority to a third party, CODE, was both strategically astute and politically beneficial. The question, then, is how did the architecture of ESGA enable CODE to secure commitment to, capability in, and coherence among, these various components of *Education for All*.

All reforms also have an explicit or implicit architecture or design – a purpose that has to be achieved, elements and materials that will be used to construct a model that will achieve that purpose, principles and practices that will arrange those elements in a particular way, and processes to adjust and refine the design over time as problems surface and the environment becomes better understood.

ESGA's architecture of educational change is a complex, interactive and improvisational design that is sometimes central and sometimes local; in many ways politically recent but also coherent with a longer-term collaborative trend; in some regards planned in careful detail with great forethought, and in others improvised by necessity on the spot. The analysis completed in this review indicates that seven distinctive principles characterize ESGA's architecture of educational change:

- *Inspiring Beliefs* that motivate widespread participation;
- A *Moral Economy* that seeks to be prudent about individual placement yet is also persistent about classroom and curriculum inclusion;
- *Leading from the Middle* by a respected third party of former superintendents who were actively supported by a large majority of their provincial colleagues;
- *Local Authority* and flexibility that allows and insists on responsiveness to the diversity of local needs and circumstances;
- An *Integrated Strategy* that dovetails with existing high priority policy strategies;
- *Collective Responsibility* for all students' learning at the school and school board levels - especially between special education staff and their colleagues with curriculum and classroom responsibilities; and
- *Intensive Interaction* that connects everyone and creates coherence among all policy elements by constant monitoring, mentoring and cross-pollination of insights, ideas and activities.

Results

EQAO Scores

An important component of the analysis was a comparison between the study boards and the non-participating boards, focusing on the grade 3 EQAO results in reading and writing. Within each sector (Public, Catholic and Franco-Ontarian), there is considerable variation among boards on all indicators. Overall, there was slight progress in reading and substantially greater progress in writing. Much of the increase in writing scores occurred in the year that EQAO test accommodations were introduced for students who had learning disabilities, but progress was also evident in other years as well. This was the case in all three sectors. Although identification rates of special needs students did increase over the period in all three sectors, the achievement gap between special needs students and other students declined in reading and especially in writing.

Survey Results

Despite considerable variability in responses within and among the nine boards that took part in the survey, there are nonetheless distinct patterns in the responses that are consistent with the findings obtained from the site visits. There were clear and consistent indications that placement practices regarding students with special educational needs had changed since the start of ESGA. Survey respondents agreed that, since the advent of ESGA, students with special needs were more likely to be mainstreamed and to participate in both class and social activities. There was, participants believed, greater inclusion and less withdrawal since the start of ESGA.

Interestingly, respondents were less positive as to whether these students were making greater academic progress, even though the EQAO results clearly indicate a closing of the gap between the performance of these students and that of the student population as a whole.

Survey responses also pointed to shifts in the professional culture of staff relationships and collaboration in the participating schools and boards – one of the explicit intentions of the ESGA initiative. There were high levels of agreement with the closed-ended statements that there was now greater collaboration among staff, more joint planning, and broader acceptance of collective responsibility for all students. Respondents also indicated that increased attention was being devoted to examining student work, both individually and collaboratively. Open-ended responses were largely consistent with these findings.

Alongside changed relationships among colleagues, the survey results also indicated that there had been changes in pedagogical practices - particularly in terms of increased use of tiered interventions, differentiated instruction and assistive technologies.

The survey cast considerable light on the changed environment of assessment practice within and beyond ESGA. There was general agreement that practices had improved in relation to discussing and analyzing student achievement data. The mean scores of boards on questions concerning professional development indicated that most respondents felt the need for further support and training in this area, although a dilemma was also experienced by some respondents who were concerned that the quantity of professional development sometimes drew them away from spending quality instructional time with their students.

The closed ended responses showed moderate agreement that there was too much attention to data (in contrast to the use of professional judgment). Open-ended responses were more varied on this issue, although a number of them noted that there was not enough time to administer all the assessments, to interpret the results properly and to use them effectively.

Despite respondents' moderate support for the increased use of various classroom assessments, they were in general agreement that too much attention was being paid to EQAO results. In particular, many felt that for many students with special needs, the EQAO test was not an appropriate instrument for determining what they could accomplish. Among the concerns that were raised were that it was a paper-and-pencil test that did not represent special education students' wider engagements with learning; that its standardized format, along with limited accommodations, was not consistent with the differentiated instruction received by the students; and that it was a blunt instrument used to evaluate teacher performance when shortfalls in performance were a potential concern in only a small number of cases. At the same time, despite these reservations, a number of teachers indicated that the EQAO did not impact their own day-to-day teaching. Moreover, special education resource teachers especially tended to find the EQAO results helpful in pointing their classroom-based colleagues to areas and students in need of more attention.

The last two open-ended questions gave respondents an opportunity to address the perceived degree of coherence of the various reform initiatives. On this issue, most respondents indicated that the initiatives implemented in their schools were complementary and put students' needs at the forefront, although a number raised the problem that there was an overwhelming number of initiatives that were impossible to implement well as a result.

Cross-case Themes

Drawing on the evidence collected and triangulated in the course of the review, it is clear that ESGA has had a major impact on each of the boards. The nature and extent of the impact has varied from board to board, and across schools within each board. This was actually intended by the overall architecture of ESGA, given the flexibility it offered to boards to accommodate their diverse populations and the variations in their circumstances.

In general, the boards' steering committees saw ESGA as an opportunity to respond to the needs of students with special needs (identified or not), as well as students from other at-risk groups defined by language, race/ethnicity or culture. ESGA was seen as a way of increasing the capacity of boards to respond to diversity. The steering committees were very positively disposed to the inspiring belief statements in EfA. Their strategies were aimed at building the capacity of the system, at all levels, to meet the needs of diverse learners and to offer each child a meaningful opportunity to learn and succeed. Many students in the target sub-populations were exposed to greater academic content compared to their peers in earlier cohorts and, in later grades, they were better prepared for the academic demands and more able to self-advocate for the academic supports they needed to achieve.

From the outset of ESGA, collaboration among different board office departments, particularly Curriculum & Instruction and Special Education, was required and encouraged. In many boards, this collaboration matured into a true partnership, and even merger, that led to productive interpersonal dynamics, better strategic planning, creative solutions and consistent messaging. At the same time, central office staff devolved more responsibility to schools and school networks, through a strategy of constantly nudging people forward that mirrored their experiences with the CODE Leadership Team.

At the school level, ESGA often led to a greater sense of collective responsibility for all children and greater collaboration among all professionals as a necessary condition for improving the educational experiences of those children located at the margins rather than in the mainstream. The nature of that collaboration varied considerably. In some cases, it followed from greater inclusion, so that other professionals (e.g. special education resource teachers, speech and language pathologists) spent more time in mainstream classes where they could work with regular classroom teachers. In a benign paradox, while special education resource teachers now worked much more closely with classroom teachers in supporting any children who struggled with their learning, whether or not those children had been formally identified, those support professionals also became increasingly able to provide effective support to those students in classrooms who really did need highly specialized assistance. In other cases, professional collaboration and collective responsibility were manifested through joint consultations among teachers of different grades, so that students would experience greater continuity of pedagogy and support as they advanced through school.

Professional learning communities (PLCs) were a common vehicle for fostering collective responsibility and providing some of the support needed to sustain it. PLCs became a forum where principals could exercise instructional leadership and where “challenging conversations” could take place – even if some of those conversations pushed too hard because of the ubiquitous pressure of the EQAO threshold targets. In some boards, a focus on systematic assessment and the examination of student results provided both a common language and a focus for teachers’ conversations. At the same time, there was clear, and more than anecdotal, evidence that the pressure of meeting the threshold targets led some schools to adopt measures such as concentrating undue attention on students near the Level 3 proficiency target compared to those who may have had greater needs, or focusing only

The widespread recognition of the need to build the capacity - or what we would now call the professional capital - of teachers to master differentiated instruction, diagnostic assessment, evidence-informed decision-making, and so on, led to a commitment to professional development (PD) and an impatience with PD formats that were not seen as effective. Generally, PD that was more local, particularly when it was modeled in the classroom (at-the-elbow support), was regarded as most effective, although larger PD sessions were still valued for heightening initial awareness of the changes that were central to ESGA. In addition, as a result of greater inclusion, other professionals spent more time in regular classrooms and were therefore able to contribute to developing their colleagues’ professional capital and capabilities as the occasion or need arose. By dint of their specialized knowledge or experience, many individuals who had not been considered “school leaders” were now able and encouraged to take on important roles in teacher leadership, in ways that distributed leadership more widely across the schools and the boards.

The goal of ESGA was to make the vision of EfA that all children can learn come alive and turn it into a reality. Through such means as greater inclusion in mainstream classes, application of universal design principles, implementation of differentiated instruction (DI), and the use of assistive technologies, this is exactly what ESGA made possible. In many boards, the key was known as the 3P’s (or their equivalent) - personalization, precision and professional learning - with the first two representing a commitment to DI. To be successful, DI requires evidence regarding a student’s current accomplishments, needs and difficulties. As a result, many boards invested in enhancing the assessment tools that were available to teachers and in providing the support that was needed to use them effectively.

ESGA had many strengths that, in some cases, also served as limitations. By aligning the ESGA reform strategies with existing provincial initiatives and priorities, boards garnered political support and reduced the possibility of generating conflicting agendas that could have materially damaged the credibility and attractiveness of those strategies to school leaders and teachers. At the same time, such alignment effectively inhibited movement beyond incremental improvements to more disruptive changes in goals and methods. Similarly, by investing primarily in supporting within-Board work, there was less funding available to promote networking among and across Boards. That effort was undertaken primarily by the CODE leadership team, the annual meetings it sponsored, and the monitors it assigned to make periodic visits to the boards.

The qualitative, quantitative and policy data of this study point to the importance of ESGA as an initiative that has made a significant and distinctive contribution to educational reform in Ontario and to models of educational reform worldwide. Collectively, the specific findings of this study are more than merely additive: they constitute a strategy and approach that has great implications for how systems and schools address the education of students with special educational needs, as well as how they educate all the children that they serve. We turn now to these conclusions, to their implications and to the recommendations that arise from them.

Conclusions and Implications

The ESGA project that was initiated and led by CODE is one of the most remarkable and distinctive examples of a systemic educational reform strategy worldwide. It contrasts starkly with what is increasingly being understood and critiqued as the Global Education Reform Movement, or GERM. This reform movement is increasingly driven by

- *Centralization* through top-down control and change delivery;
- *Individual autonomy* of (and market competition between) schools in terms of financial and staff decision-making;
- *Standardization* of teaching and learning that insists on educators' fidelity to and compliance with prescribed curriculum changes;
- Assumptions that people must be made to change their *practice before* they will alter their *beliefs*;
- *Data-driven improvement* through tracking, monitoring and intervention;
- *High-stakes testing and threshold targets* to direct the change process and demonstrate its success;
- *Technology as a panacea* for problems with education;
- The *low status* and marginal importance of *special education* as a relatively unimportant or separately managed part of the overall reform process.

In contrast to these reform precepts that are being widely embraced and implemented across the world, ESGA offers and exemplifies some striking alternatives, as well as some distinctive contributions to the theory and practice of educational change. In summary, the insights are that:

- Leading from the middle, school board leaders can be dynamos of system-wide change;
- Beliefs can and do shift before people's practices, as well as vice versa;
- Board-level discretion enhances responsiveness to student diversity;
- Collective professional interpretation and responsibility puts faces on student achievement data;
- Compared to imposed threshold targets on standardized tests, diagnostic assessments and growth or progress measures of student achievement tend to have a more positive impact on teaching and learning;
- Technology can be beneficial when it is wisely integrated with effective pedagogy;
- Personalization of learning has increased, but has yet to extend beyond flexible customization of access to existing learning so as to embrace learning that has deeper and broader personal meaning and engagement for all kinds of students;
- Special education reform can provoke positive change across the entire system;
- A one-time change can have a lasting impact.

The contrast between these two generalized approaches to reform is summarized in the table below.

GERM	ESGA
Centralized delivery	Leading from the middle
Practice changes before beliefs	Beliefs also inspire and drive practice
Imposed standardization	Responsiveness to diversity
Individual autonomy	Collective responsibility
Data-driven improvement	Evidence-informed improvement
Pressure to reach thresholds	Progress measured by growth
Technology as separate solution	Technology as integrated practice
Rigid standardization	Flexible customization
S.E. is low status & marginalized	S.E. is integrated & integral
Short-term gains	Short-term actions; lasting results

1. *Leading from the middle*

Globally, system-wide reform is being driven by the idea that control, direction and delivery should come from the central government and its bureaucracy. At the same time, in many countries, there is a parallel advocacy of individual freedom and autonomy for school-level decision-making. What local autonomy does *not* mean in these reform models is the collective autonomy of schools working together under district (board) control, and of districts working together within a wider system, to generate and drive change.

The findings of this review reveal that Ontario’s school board leaders and superintendents have been the dynamos behind the province’s special education strategy, generating the forces that have given it momentum and energy. This influential group of highly respected middle-level school system administrators did not just deliver but also developed much of the reform strategy that included processes of coaching, mentoring, cross-pollination and communication of key ideas. The capacity and agency of this group was made possible, in large part, by a resourcing strategy of equal funding that incentivized participation by all 72 boards, especially the many smaller ones. This built for ESGA a critical mass of political and professional capital among directors and superintendents of education, acting as an influential and well-networked province-wide community. Their impact and success point to the power of collective rather than individual professional autonomy as a force for positive educational change.

Leading from the middle was also evident in the fact that responsibility for planning and implementation was devolved to a core team of key staff who jointly developed project goals, designed an implementation strategy and monitored results, making necessary changes and refinements as they amassed evidence on what was working and what was not. Being owners of the strategy, buy-in was not an issue for them. Indeed that ownership, and the corresponding commitment to the changes, prompted them to expend their professional capital over a long period to make this effort a success.

2. *Beliefs before practice*

In educational change theory and practice, it has become commonplace to claim that change typically occurs when people are pushed into changing their practices and, that with the right support, they will come to alter their beliefs. The contrary case that people's beliefs change before their practices is often overlooked. The results of this study of ESGA provide support for both sides of this debate.

On the one hand, some special education resource teachers pointed to the impact of EQAO testing as a way of getting classroom teachers to take more responsibility for children with learning disabilities, rather than handing these students over to the resource teacher. Administrators pointed to how newly introduced protocols of professional interaction, such as looking together at examples of student work, had pushed some teachers into recognizing that their practices had been falling short, and that they could achieve better outcomes from students who had not been achieving well. Requiring special education and curriculum specialists at the school board level to co-sign board applications for ESGA funding was another procedural device to induce staff to work together more collaboratively.

On the other side of the practice/beliefs debate, this review has unearthed considerable evidence that shifts in beliefs can inspire changes in practice. The philosophy of *Education for All* and its advocacy of universal design for learning, differentiated instruction, use of assistive technologies and development of professional learning communities, drew widespread approval for setting an inspiring direction for special education reform and for attending to the unique needs of each and every child. Teachers also mainly welcomed how they had more opportunities to meet with their colleagues in professional learning communities (except when this drew them away too often from their own students), and they valued reviewing their students' achievement data when this led to deeper and more productive discussions about particular children and their overall needs. The evidence of ESGA is that when change connects with the deep moral purposes and the professional aspirations of classroom teachers, and provides some discretion about how these aspirations are fulfilled, inspiring beliefs can be a significant factor in transforming practice. Beliefs can change practice at least as much as the opposite.

This does not mean we should now reverse the practice/beliefs formula, however. Other evidence from this review shows that the relationship between practice and beliefs is more interactive. For example, the professional development practice known as coaching at-the-elbow nudges people forward by altering their beliefs and also their practices in incremental steps over many occasions, until instructional coaches are able to remove the scaffolding of support (and also pressure) through a process of gradual release. Similarly, PLCs that concentrated their attention on performance data used evidence to shift people's beliefs and then their classroom practices, but the initiation of these PLCs themselves constituted an imposition of new collegial practice. Restructuring through PLCs leads to reculturing of people's beliefs.

3. Responsiveness to diversity

A core characteristic of the Global Education Reform Movement is standardization. In education reform, some changes like the elimination of physical punishment or the use of clear protocols for fair teacher appraisals, have benefitted from standardization. But more complex changes like the provision of suitably differentiated instruction for student populations that vary from one school or board to another, require exercising high standards of informed professional discretion and judgment rather than standardized practices implemented with uniform fidelity.

There is great cultural, linguistic and religious diversity in Ontario. A productive way to engage with such diversity, this review has shown, is neither through a sole focus on narrowing achievement gaps in tested literacy and numeracy nor by applying standardized strategies to districts serving very different kinds of communities. Instead, the architecture of ESGA, with its emphasis on school board authority and flexibility, has enabled boards to employ *responsive diversity practices* that have greater potential for engaging all learners and increasing their achievement. The practices have three defining characteristics: *demographic empathy* to understand and engage with the assets of different communities, *inclusive achievement* through strategies such as differentiated instruction, differentiated assessment and assistive technologies, and *collective responsibility* among grade levels and across the divide between special education and curriculum, to ensure that those with diverse and special needs are fully included, differentially treated and absolutely respected because of their differences.

4. Collective Responsibility

The importance and widespread exercise of collective responsibility is another significant finding from the ESGA review. Survey data indicated that teachers were spending more time in professional learning communities, were looking at data together more, and were collaborating more with a range of other colleagues, especially in the case of classroom teachers on the one hand and special education resource teachers on the other.

Collective responsibility means more than just planning collaboratively or sharing good practice. It is about having a common professional and emotional investment in, and mutual professional accountability for, the success of all students across all grade levels, subject departments and the special educational divide. It is about moving from “my students” to “our students”. This was evident in how classroom teachers and special education resource teachers worked together to support individual students’ progress. It was also apparent in how teachers in many schools were able to witness successes or shortcomings in student progress as these were evident on data walls displaying all students’ achievements, and in how teachers then engaged in committed and sometimes challenging conversations together about how to advance these students or “move them forward” more effectively. At the same time, although collaboration seemed to increase in relation to data-related activity, teachers reported little or no movement in areas of collaboration such as observing colleagues teach or making unsolicited suggestions to their peers.

5. Evidence-informed improvement

A significant component of the Global Education Reform Movement is the adoption of data-driven improvement, which has been seen as a way to raise student achievement and narrow achievement gaps and has been tied to a reform agenda of increasing equity, as well as improving standards in educational achievement.

In Ontario, data walls have been widely though not universally adopted as tools both to focus discussion in professional learning communities on individual children's progress and to raise expectations and improve instructional strategies for all students. Data warehouses have been or are being developed across the ten school boards, though the extent to which these are used by administrators and teachers within schools and school-level professional learning communities, and not only board offices, varies considerably among boards.

In general, administrators within schools and especially within school boards were more sanguine than classroom teachers about the benefits of cultures of data use. Grass-roots support for cultures of data use was strongest where:

- Professional learning communities used the data to provoke deeper conversations about the progress of particular children;
- There was ongoing professional development on how to connect achievement data to instructional decision making;
- Schools and school boards made available, used and valued a wide variety of relevant assessments, including diagnostic tools that provided real-time data about the progress of individual students;
- Data systems were fully developed and widely accessible; and
- Time was provided for professional collaboration.

When these conditions, cultures and supports were in place, schools were not merely data-driven; they were evidence-informed by the analysis of rich data and the exercise of professional judgment in combination.

6. From thresholds to growth

The most contentious aspects of data-driven improvement concerned the uses of EQAO data and the concomitant emphasis on reaching provincially mandated threshold levels of achievement. Survey data pointed to perceptions that there had been an increased board-level focus on EQAO data since the implementation of ESGA. On average, educators were more critical than supportive of the use of these test score data, and more critical in comparison to their views of other reform components that comprised or impacted on ESGA, such as professional collaboration, differentiated instruction or assistive technologies.

The case studies revealed that administrators were more likely than classroom teachers to support EQAO and its use as a way to concentrate the attention of schools and teachers on raising expectations for all students. Special education resource teachers also indicated that the achievement of special education students on EQAO, after proper support had been provided, pushed their classroom teacher colleagues into recognizing the potential of these students and eased the way to their agreeing to share responsibility for the progress of all students. At the same time, for many teachers, there was considerable tension between the importance of tracking student progress and the satisfaction that they derived from seeing the growth in student learning that often resulted, on the one hand, and their experiences with the pressures linked to the threshold indicators based on EQAO performance, on the other. These indicators were seen as less valuable than other measures in providing useful diagnostic data. Moreover, they were regarded as inappropriate metrics for judging the performance of many students with special educational needs. Pressures associated with the “Drive to 75” also subjected more than a few teachers to intense and distracting administrative pressure to concentrate their efforts on students who would yield the easiest threshold gains, rather than on all students and, especially, those who had the greatest needs.

7. Technology and pedagogy

Following the report of *Education for All*, Ontario’s special education strategy has supported and encouraged the use of assistive technologies as a way to develop and demonstrate the learning and achievement of students with learning disabilities. This study documents the growing rates of adoption of assistive technologies. The benefits of using and developing assistive technologies in ESGA have been clear and considerable: They can increase participation, enhance inclusion, develop positive identity and self-confidence and raise achievement in the community of students with special educational needs.

The introduction of assistive technologies was associated with a significant spike in student achievement on the EQAO writing test in the year that additional accommodations were introduced. Throughout the system, this spike was interpreted as being a legitimate result of students with special needs now having the opportunity to translate their understandings of material into test responses, as well as reflecting the impact of converging efforts and initiatives in ESGA, such as embedded professional development, evidence-informed improvement processes, differentiated instruction, and so on.

Assistive technologies have been used most successfully when they are placed in the service of the primary learning goals of the school system. Their greatest impact has been when they have been integrated into classroom teachers’ practice with all students rather than just providing a form of separate (and sometimes stigmatized) source of support for individual students with identified special needs.

When assistive technologies were implemented in a separated rather than integrated way, funding was more likely to be discontinued, teachers with greater seniority were less likely to be supportive, and leadership turnover exposed the innovations to budget cuts. In other words, to be essential and effective for some, assistive technologies had to be part of a school environment where technology in general was seen as good for all.

8. *Flexible customization*

In terms of changes in curriculum and pedagogy, ESGA advanced and substantially achieved what we call *standardized personalization* – the standardized processes of precise diagnosis, just-in-time intervention, and differentiated instruction to help all students succeed. At the same time, these processes also took the form of *personalized standardization* in that they provided customized and flexible access to a somewhat standard and set curriculum of literacy and numeracy. In this respect, they did not really widen or deepen that curricular engagement beyond these areas of focused priority. For example, some case study participants felt that attention to the arts and social studies had been lost as a result of the relentlessly “serious” attention to raising achievement in tested areas of literacy and numeracy.

9. *From the margins to the mainstream*

In organizational terms, ESGA has comprised a remarkable, ground-breaking example of how special education reform can be not merely a sidebar to major educational change agendas, but can also prompt changes in thinking about educational reform more widely. Systemically, ESGA raises the possibility that what might be essential for effective reform in special education, may be good for reforms that affect all students and schools more widely.

ESGA demonstrates that successful educational reform can be achieved by creating momentum and cohesion among professionals distributed across boards and schools, rather than having to design, drive and deliver all changes from the political and administrative centre. It shows how collective professional responsibility among all staff is integral to effective educational change. It assigns importance to, and affirms the significance of, the local authority of school districts, their leaders, and their core teams, as dynamic agents of such change. It shows that coherence of effort can be achieved not only by centrally determined structural plans, but also by constant communication among system leaders and between these leaders and their schools. It restores the place of compelling beliefs as ways of inspiring educational change in and of themselves, rather than relegating beliefs to subsidiary importance that only come into play after systems have exerted pressure on educators to alter their actions. And it highlights how effective educational strategies can be designed so that they can recognize and appropriately respond to local diversity, rather than imposing a one-size-fits-all template of standardized change irrespective of any local differences. *Essential for Some, Good for All* can and should be a more favored educational reform strategy worldwide -- one that is more consistent with the improvement strategies of other high performing systems than with the practices of top-down standardization that are typical of the current Global Educational Reform Movement.

10. Sustainability

When the CODE developed its special educational reform strategy, and believed that it had only a single year of budgetary support, it decided to try to make short-term changes that would have a lasting and sustainable impact. Fortunately, in the end, there were three years of support.

Four years after the commencement of ESGA, in the province overall, there was slight progress in reading and substantially greater progress in writing. Although ESGA did not arrest the rising identification rates of special needs students, the achievement gap between special needs students and other students narrowed in reading and especially in writing. These gains were not confined to the year when there was a “spike” in writing results for special needs students and when test-taking accommodations had been introduced for these students.

In the period since the introduction of ESGA, survey participants reported increased knowledge and awareness of the Education for All document. They reported spending more time engaged in collaborative planning, embedded and ongoing professional development, discussing student work and analyzing student achievement data together. Respondents generally agreed that students with special educational needs were more likely to be mainstreamed, were participating more fully in classroom activities, were better able to advocate for themselves, and were making more rapid progress academically. Survey results, along with case study data, also indicated that, in the views of participants, there had been increased use of, as well as increased benefits accruing from, practices of differentiated instruction, tiers of intervention, assessment for learning and assistive technologies. All these reports were made several years after the initiation of these strategies and, therefore, provide credible support for the long-term and sustainable impact of ESGA on teachers’ awareness, beliefs and practices.

The one-time change that CODE intended to make overall was to change the “way of doing business” in special education. With teachers reporting closer and stronger relationships between classroom-based educators and special education resource staff, and with boards forging closer connections between, and sometimes complete integration of, curriculum and special education staff, the evidence is that this change was both successful and sustainable.

The continuation of ESGA itself has been apparent in the publication of newsletters, in the regional-level implementation of early literacy initiatives, and in the participation of the ten study boards in meetings about and exchanges of practice during the course of this study. But the legacy of ESGA is not so much in the project itself; rather, it is in the relationships it has strengthened between special education staff and other personnel, in the persistence of changed practices and beliefs concerning differentiated instruction, and in professional collaboration that has extended far beyond the span of the funded initiative.

Recommendations

The conclusions of this review suggest a set of recommendations that arise from the results of this study, the purposes of the ESGA reform and of Ontario educational reform more generally, and our own experience of studying and working with the reform strategies of other high performing educational systems across the world.

1. Continue the legacy

Important lessons have been learned from ESGA and their legacy should be actively promoted and perpetuated: differentiating both instruction and assessment; integrating classroom and curriculum responsibilities with those in special education throughout the system; strengthening professional learning communities and the sense of collective responsibility among all school staff; effectively yet judiciously integrating technology into all classroom settings; and making evidence-informed rather than merely data-driven decisions about student needs and targeted instructional improvements.

2. Restore the role of beliefs

At every level, including and also beyond educators who are specifically concerned with special education, it is important to recognize and restore the role of educators' beliefs as significant contributors to and generators of educational improvement. Inspiring educational leadership can change or modify beliefs regarding what achievement can be expected from all students. The role of beliefs can be expressed in assigning value to reflective rather than merely technical coaching; it can be made more evident by involving professional educators from classroom teachers to school board teams in developing and not just delivering effective reform; and it can be brought to life in the creation of stimulating professional learning communities, especially in terms of promoting thoughtful rather than reactive interpretations and uses of student achievement data.

3. *Promote mindful uses of technology*

Educators increasingly understand that technology is essential for some students to access the curriculum. Effective adoption of assistive technologies for students with special educational needs requires constructive use of digital and other technologies in all classrooms within a school, so that assistive technologies do not become isolated and, thus, more easily discarded. This, in turn, calls for development and training in mindful uses of technology for all teachers and leaders. On the one hand, this means being comfortable with digital technologies, knowledgeable about how students can use and misuse them, and capable of integrating them into everyday practice. On the other hand, mindful teaching with technology requires being judicious in its use within a mixed economy of classroom pedagogies, and it also means educating and protecting children against the damaging effects of technology such as short-term thinking, proneness to distraction, and so on. One of the drawbacks in supporting the use of new technologies is that staff development in this area is usually carried out by enthusiasts for or converts to the technological cause. Mindful uses of technology that create a supportive environment for using assistive technology could benefit from the inclusion in professional development teams of educators who can offer a more skeptical perspective on some aspects of technology, in order to foster a more balanced or blended approach to its use.

4. *Inquire into rising rates of identification*

Despite its other successes, ESGA did not succeed in reversing the upward trend of identification of individual students with special educational needs. This could mean that the quest to develop more effective differentiated instruction in order to reduce identification rates may not have been successful, may not have had the time to be successful, or may have forestalled even higher rates of identification. At the same time, increased (and costly) rates of identification may be attributable to other factors such as greater parental awareness and advocacy, the increased sophistication and profusion of diagnostic testing processes, the heightened levels of identification that are associated with allowing more accommodations for students who take the EQAO test, or changing circumstances that affect child development in the wider society. The reasons for increased identification in Ontario and elsewhere constitute a serious issue that deserves systematic research that examines and responds to all potential causal factors.

5. *Shift the assessment and reporting emphasis from thresholds to growth*

Although administrators often welcome the leverage afforded to them by threshold measures of student performance such as EQAO, teachers frequently feel compelled to use questionable strategies to raise reported achievement, such as concentrating on students closest to the threshold – even when policy leaders explicitly advise against doing so. This phenomenon is certainly not particular to Ontario, but is common to all systems that assign numerical thresholds to performance targets. Growth measures of performance that assess how far and how fast students move from one level to the next are more valued by teachers, are seen as fairer to students (particularly those with special needs), and are less likely to introduce “perverse incentives” to meet the threshold requirements by inauthentic means. Reporting on growth also provides parents and the public at large with a richer picture of school and system performance. The evidence of this study suggests that it is perhaps now time for the province to move from exclusively threshold-based to more growth-based measures of system-wide testing and reporting.

6. *Increase leadership capacity in managing evidence-informed improvement strategies*

Many school and system leaders in this study demonstrated high capability in leading effective professional discussions about student learning and achievement and how to improve it, based on a wide range of statistical data and other kinds of information. This was not true of all leaders, however. Some were unable to share voluminous amounts of centralized data with their colleagues in schools. Others overemphasized the statistical data, and EQAO results in particular, and seemed unable or unwilling to put faces to the data through professional knowledge of, and relationships with, students. Then there were leaders who were in a great quandary about whether to praise or exert pressure on their teachers when they saw that they had achieved significant growth with their students yet were still falling short of the provincial thresholds for proficiency. All this suggests that more and better leadership development for principals and school system administrators is needed to help them spearhead evidence-informed, rather than merely data-driven, professional learning communities, and to be able to manage the ethical dilemmas of leadership – particularly through providing high-level, at-the-elbow assistance.

7. *Increase leadership stability*

Effective professional learning communities and successful integration of assistive technologies require high trust and knowledge of the school culture and, therefore, a high degree of leadership stability. One threat to the sustained impact of ESGA was high leadership turnover or instability in some cases that resulted in new principals who were not committed to the programs of their predecessors, or the loss of understanding and support when large numbers of teacher leaders were promoted out of their schools to become coaches and trainers for their board or the province. Many factors affect system stability and are worthy of systematic attention and review. Some possible remedies include reducing the frequency of regularized principal rotation between schools; developing more genuine sharing of leadership authority between principals and teacher leaders so that a professional community or reform program can survive the departure of an outstanding principal or several teacher leaders; and reducing inter-board competition in the hiring of principals in the same geographical area across sector boundaries (Public/Catholic/Franco-Ontarian).

8. *Renew school board authority:
lead more from the middle*

The school boards in this study were not just deliverers of centralized policies. Individually and collectively, in conjunction with the support and monitoring of former school board leaders and the CODE leadership team, they were active agents and the principal dynamos of educational changes that benefitted all students. Through the flexible design of ESGA, the boards and their core teams were empowered to respond to local diversity by leading from the middle. This suggests the need to halt the worldwide trend in GERM toward centralization of authority for educational management and reform. Rather, we should strive to preserve local control over those issues where boards have the greatest knowledge, democratic representation and professional authority. Leading from the middle at the board and provincial level can be a way to combine expertise with ownership and authority in the leadership of change.

9. Promote greater school board co-operation

The achievements of *Essential for Some, Good for All* resulted not simply from individual school boards acting autonomously, but from boards forming and exploiting collaborative networks. This occurred within a province-wide culture of collective commitment of board leaders to the principles of EfA. All this was triggered, in part, by a funding strategy that energized a large number of smaller boards that constituted a critical mass of the province's system leaders. The value of regional professional development was stressed in various parts of the study's qualitative data and in ESGA's own interim evaluations. At the same time, ESGA occasionally faltered when geographically contiguous boards from different sectors actively competed for students, teachers and principals and were, therefore, hesitant about, or even resistant to, sharing practices with each other. One answer to these instances of inter-board competition may be to promote wider collaboration not only over shared facilities and resources but also over programs and reform knowledge. One organization that could take a leading role in promoting stronger inter-board collaboration is the Council of Ontario Directors of Education.

10. Widen engagement; deepen personalization

The practices of tracking student progress and differentiated instruction that have been promoted through and beyond ESGA, have contributed significantly to the capacity of boards and their schools to respond to the various types of diversity in their communities. In turn, this has resulted in greater personalization, or flexible delivery, of instruction in the core areas of literacy and numeracy. With the province now come close to reaching its proficiency targets in these areas, the time may be ripe, in the context of a knowledge-driven economy, to move to the next level of change by increasing the attention devoted to other areas of the curriculum such as social studies, technology and the arts. These subjects have the potential to engage an even wider range of students through deeply personalized connections to their cultures and their life projects that can also magnify the impact of more flexible approaches to instruction and assessment.

Last Word

This report has reviewed a strategy to support students with special educational needs in ways that provide benefits to all students. As the title of this report suggests, in policy and elsewhere we must be leading not for the average student, or even the majority of students, but for all of them. And this in turn requires spearheading the development of strategies of curriculum, pedagogy, tracking, intervention, assessment and technology provision that are inclusive of all students and their teachers. Leading for all cannot be undertaken by a few on behalf of everyone else. Leading for all must also entail leading by all and with all – special education and curriculum staff working together in boards and in schools; district leaders moving change forward from the middle as well as central policy makers setting directions at the top; and teacher leaders playing their part in coaching and mentoring, building collective responsibility, and serving all students together. This, perhaps, is how best to meet the system where it now is, so that everyone, together, can move it forward.