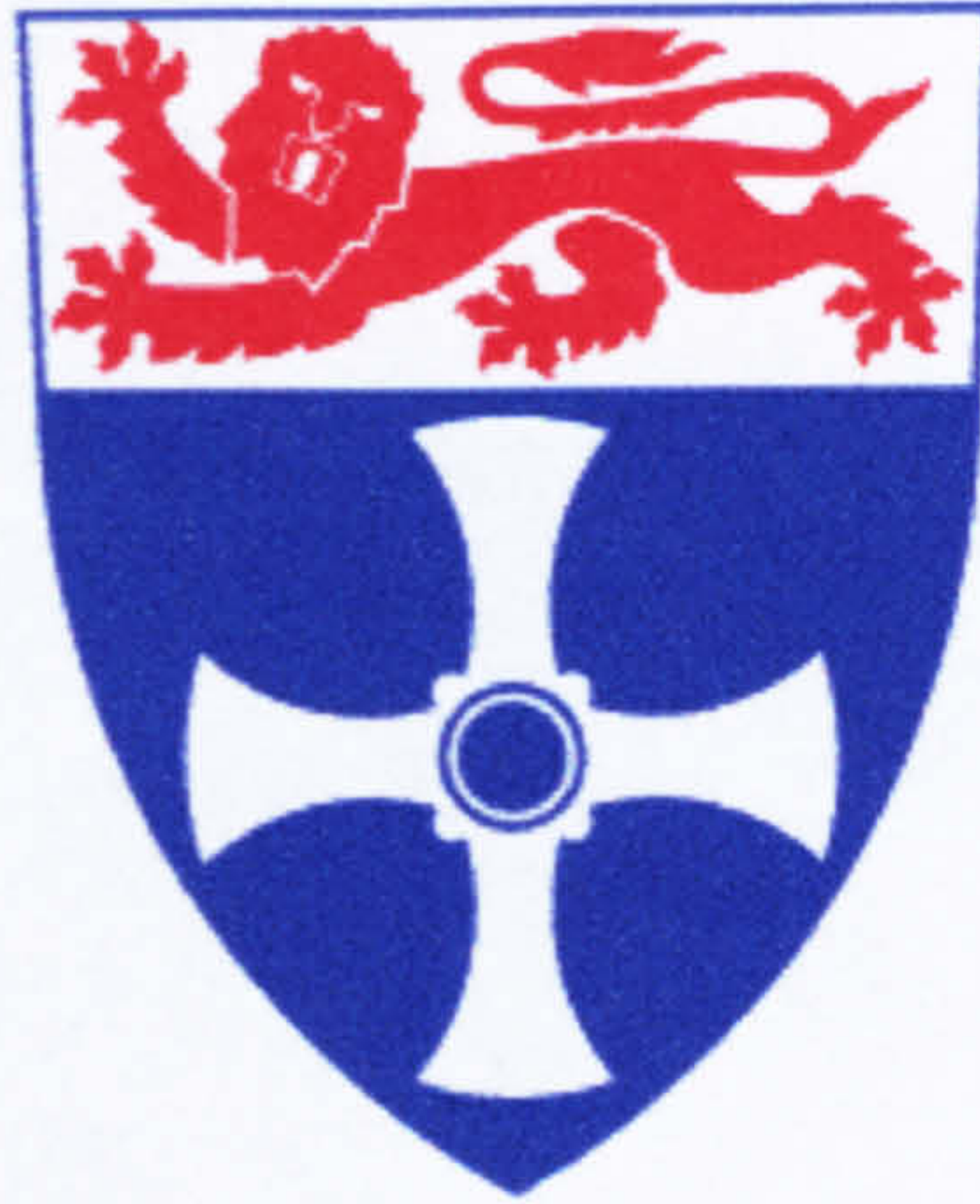


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**DEPARTMENT OF EDUCATION**

Submitted to the University of Newcastle Upon Tyne for the fulfilment of the  
requirement for the degree of Doctor of Philosophy (Ph.D.).

**Changing Perspectives Towards A More Constructive Practice: Reflections On The  
Complexities Of Implementing The Portage Programme In Northern Namibia.**

**John Moore**

April 2002

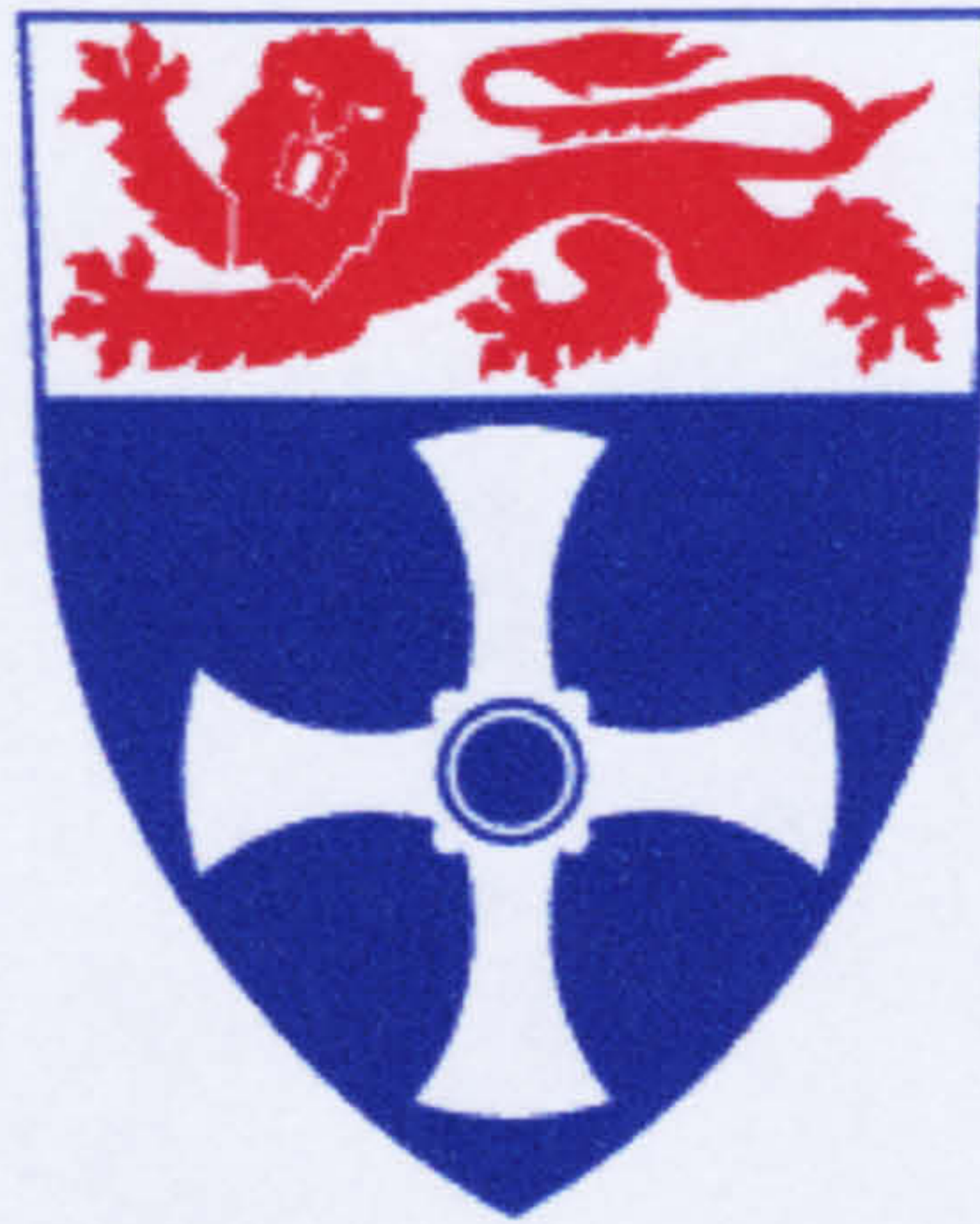
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A handwritten signature in dark ink, appearing to be 'G. Moore', written over a dashed line.

Date: \_\_\_\_\_

A handwritten date '17th October 2002' in dark ink, written over a dashed line.



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## ABSTRACT

Globally, the current concern with childhood disability has spurred a sense of international urgency with the recognition that while the vast majority of children with disabilities and special needs live within developing countries very few have access to formal supportive services. The huge scale of the problem has triggered the involvement of Western special needs experts and the development of many intervention programmes. One programme in particular, the Portage Programme, has enjoyed rapid international expansion in recent years.

This thesis addresses the question of how Western Portage experts might develop effective programmes and more collaborative and reciprocally beneficial ways of working with local colleagues and families, which are sensitive to, and respectful of, different cultural practices and beliefs.

The thesis focuses on the changes to my understanding of expert practice regarding Portage Programme development within the cross-cultural context that initially stemmed from my attempts to introduce such a programme to a rural area within northern Namibia. I claim that Portage experts can benefit from primarily viewing their practice in terms of constructing relationships with others rather than as it is usually portrayed within the Portage literature as delivering technical advice and solutions. I suggest that this shift in the focus of practice entails a reconsideration of the ontological, epistemological and methodological assumptions upon which expert practice is based. A Portage programme's development is characterised not as primarily about applying and transmitting Western expertise and knowledge, but rather as a process of 'change through exchange'. I suggest that a systemic, social constructional conceptual framework that embraces many of the broader ideas of postmodernism, offers another way of thinking about the subjects of Portage programme implementation, expert involvement and professional development, and thereby simultaneously also another way of more constructively practising.



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## Chapter I

### The Context For This Research

#### 1.1. Introduction

Globally, within the last two decades, what we in the West have come to conceptually understand as 'disability', has assumed a prominent concern among international development organisations and has spurred the proliferation of numerous programmes, projects, conferences and research papers. However, despite over twenty years of such international endeavours, it would seem that for the majority of people with disabilities and their families there has been little in the way of improvement (UNICEF, 1981a). It is often quoted for example, that between 75% to 90% of people with disabilities are to be found within developing countries (Helander, 1992; McConkey and O'Toole, 1995), but that fewer than 2 % are presently receiving any rehabilitation or educational services (O'Toole, 1988; UNESCO 1988; Marfo, 1994). Furthermore, it is also recognised that children represent a significant portion of the world's disabled population and that most of these children live within developing countries (UNICEF, 1981b; UNESCO, 1988; Helander, 1992; Mittler, 1993). In addressing this apparently pressing need, the common vision of many international organisations and development efforts currently is for the expanding of services for children with disabilities and their families in developing countries in-line with those which have taken place within the industrialised West.

However, in striving towards achieving that objective, much of the relevant literature also indicates that international development moves to date have been significantly frustrated by the fact that the vast majority of children with disabilities who live in developing countries are to be found in rural, often remote and inaccessible areas (UNESCO 1988; O'Toole, 1991; Action on Disability and Development, 1997). So while within a few developing countries urban-based rehabilitation and educational programmes may have achieved some minimal level of success, there have been great difficulties in attempting to reach the more extensive rural population (International League of Societies for Persons with Mental Handicap (ILSMH), 1990).

Leaving aside, at this stage, questions about the complex methodological difficulties created by the cultural and conceptual issues of these international surveys and statistics concerning the problem of childhood disability, it can be understood how such figures



certainly create a powerful picture of the scale of the problem and of the enormity of the task that seems to face the international development community. By picturing the developing world as being also plagued by childhood disability, together with the absence of adequate special resources to meet the special needs of such children, this has internationally sustained a great sense of urgency for action. Additionally, it seems that this challenge has legitimised the further development not only of specialist disability and educational services but also calls for greater expert involvement, particularly that of Western professionals. For example, the International School Psychology Association (ISPA, 1997, no page number) has lamented that within developing countries:

“Despite an estimated 150 million children with learning disabilities, few professionals outside of western Europe and North America are properly prepared to work with them, and methods to identify and intervene are lacking”.

Yet Western driven international development efforts to assist children with disabilities and special educational needs in developing countries have also not been without their critics, often local people themselves (Marfo, 1994; Action on Disability and Development, 1997). For example, programmes have been accused of being too ‘top-down’ and impositional, lacking sufficient active and collaborative involvement by local people, so creating distrust and a failure to adequately appreciate the often unique local conditions facing families of children with disabilities in rural communities. Similarly, other concerns have included the inappropriate transfer of Western special educational needs programmes into non-Western contexts, so as to render them out of synch with the specific cultural beliefs and practices of local families and local communities. Indeed, some Western experts have also questioned the inappropriate use of Western special educational approaches (e.g. Baine, 1988; Helander, 1992; Kalyanpur, 1996) and the “blinkered desire to imitate the services offered in the West” (O’Toole, 1987, p. 179).

The international picture might therefore be summarised as one in which it is widely recognised that there is a huge and growing discrepancy between the urgent needs of children with disabilities and special educational needs within rural communities and the ability of aid and development agencies to adequately provide supportive rehabilitation and educational services. It seems that this situation has persisted despite the best efforts of international development agencies. Moreover, where Western expertise, programmes and services have been provided these have often been criticised as inadequate and/or



inappropriate to the specific practical and cultural needs of the children and their families.

It is within this wider and complex international context, that one specific form of special educational needs intervention known as the Portage Programme has globally emerged as very influential. The Portage Programme is a special education programme that aims to support families and children with developmental delay and disabilities. Initially designed and implemented within the United States of America, it has become one of the most internationally renowned educational programmes used for assisting developmentally delayed children and those with disabilities throughout both the developed and developing world (Mittler, 1981; Mittler and Serpell, 1985; Sturme et al., 1992; Baird and McConachie, 1995; Cameron, 1997; Oakland, 1997). It is this programme and a particular concern for the practice of experts who assist in its development in different cultures and contexts that is the focus of this thesis. The central question that my thesis attempts to consider is therefore easily stated; how might Portage experts, who are predominantly from the West, but who are invited to practice their professional skills in non-Western contexts, develop practically effective educational programmes and more collaborative and reciprocally beneficial ways of working with local colleagues and families, which are sensitive to, and respectful of, different cultural practices and beliefs? In short, this thesis is therefore about the professional challenge for educational expert practice of engaging with difference within a cross-cultural context.

### **1.1.1. An Overview Of This Thesis**

This thesis presents my own professional attempt towards meeting that challenge. My thesis has emerged initially from my work within rural northern Namibia as a Voluntary Service Overseas recruited educational psychologist. As part of my professional role I worked with local Namibian colleagues to develop an educational provision which we believed to be relevant to the needs of local families and their children with severe levels of special educational needs. This experience and my own professional learning that accompanied it provided the stimulus for my further research into questions about my expert practice, particularly in relation to the Portage Programme.

I also undertook this research because of my concern that the current rapid international



expansion of Portage and the expert practice which both encourages and supports that expansion, is largely understood and portrayed within the Portage literature in technical terms. As I will demonstrate in the review of the Portage literature below, the bulk of Portage research appears to be concerned with the programmatic features of Portage, largely employing technological and objective narratives so that, as Mittler and Serpell (1985, p. 725) complained, “Advocacy of home-based education has often been linked to the principle of diffusing technical knowledge”. That is, expert practice is seen primarily as addressing technical questions, such as how the programme can be adopted and adapted so that *it*, the programme, can operate effectively within particular countries and different cultures. The goals of the programme, the ‘ends’ sought, are often assumed to be universally applicable and so largely beyond question. The task of the expert therefore becomes one in which they are expected to strive, instrumentally, for the development of this conformity of outcome. My concern is that by primarily focusing upon the instrumental means of how programmes are dispensed and implemented to bring about change, Portage programme development becomes characterised by an over emphasis on ends rather than on means. That is, means are understood simply in terms of narrow alternatives to achieve given singular ends. As this technological approach rarely questions the given ends, little thought is therefore directed towards questioning the means, beyond their utilitarian ability to achieve the predetermined ends. Means are understood simply in terms of alternatives to match and achieve given ends, so that the impression is that experts can implement Portage programmes as if ‘by numbers’ when the correct means is selected to match the already ‘known’ ideal outcome.

In this sense the actual expertise of Portage experts is also effectively seen as an ends orientated teleological and linear exercise. This too is often reflected in the narrative style of many Portage expert reports and I have found, as Schön (1991, p. 317) also lamented over concerning expert practice generally, that most appear to imply that the “case writer acts as though a view of the case which arose only at the end had been available to him (sic) from the beginning”. These technical narratives of Portage expert practice privilege the ‘first-order’ methodological concerns of technical efficacy. By first-order I refer to that perspective which generally assumes that the role of the expert is one in which they are called to intervene directly and authoritatively, with a high level of specialist control to achieve prefigured and unilateral change. The implicit assumptions and certainties of first-order concerns are that a technical-rationality (Schön,



1991) is the most effective means by which Portage programmes are developed and by which local colleagues are taught the necessary skills and knowledge to undertake change. As Little (1996) also criticised, the assumption of Western experts who adopt a first-order stance is frequently one of Western skills and knowledge having global relevance. I am therefore concerned that the predominantly first-order focus of Portage research, while having some relevance, may, if unchallenged, effectively imply that Portage is a trans-cultural and standardised instrument, which may be universally applied. When understood as such the Portage expert's role becomes primarily one in which they act as the key arbiter of programme *outcomes*. Indeed, as my review of the Portage literature will also show, the role and practice of Portage consultants has itself been overlooked as a topic for research.

However, from my own practice experience of working overseas as a Portage 'expert' as I shall describe in Chapter III, I realised that there was another, and in my view more important, systemic dimension to Portage development and expert practice. By systemic I refer to the complex network of social relationships in which experts find themselves and through which they must negotiate their way as they engage with cultural difference. Strangely, this aspect of Portage development and expert practice, the openness of the context in which experts work, has also been largely neglected by the literature and there appears to have been no inquiry into the complex issues of relationships and interactions between experts, colleagues and others regarding questions of collaboration, respect for strangeness and cultural diversity. While all professional practice might be said to be instrumental, in that it aims to bring about or to contribute to change, the content of the Portage literature has been almost exclusively so, lacking any substantial reflective or reflexive elements. Consequently, in contrast to most of the international Portage literature, within this thesis I am claiming that with regard to the development of Portage within the cross-cultural contexts of developing countries, experts need to understand their practice as being primarily concerned with constructing relationships of interchange with others, rather than as foremost related to the technical practicalities of applying and transmitting Western expertise and knowledge. Importantly, I believe that this shift in emphasis may also assist Portage practitioners to transcend the boundaries of their technical practice and, as a consequence, pose broader questions which are capable of reshaping their expert practice and provide more educational, practical and ethical ways of working.



Within this thesis I suggest that this methodological shift in the understanding of expert practice necessarily also entails a reconsideration of the ontological and epistemological assumptions upon which Portage expert practice is based. In fact, in a world in which contemporary professional practice and research generally are increasingly being scrutinised and questioned by the challenges of postmodernity, as I shall describe in Chapter II, I have again found that there has been a distinct lack of any substantial reflexive questioning of the underlying assumptions, values and epistemology of both Portage and the professional practice of Portage experts. I hope therefore that my thesis might additionally represent a move towards redressing this gap in the Portage literature as well as proposing a different way to understand related expert practice.

In this thesis I therefore propose that, alongside addressing technical first-order issues, there are more significant systemic ‘second-order’ questions that also need to be considered. In Chapters IV, V and VI of this thesis I will describe how this second-order systemic approach calls for experts to deliberately adopt a reflective and self-reflexive practice stance, so as to question the taken for granted values and knowledge of Portage and their own practice. I believe that this questioning can lead to a more genuine mutual exchange of information and shared decision making with colleagues, so that the process of change is viewed as a tentative and collaborative endeavour which enactively unfolds in response to the unique circumstances of the practice context. It is my view that, in the first instance, the instrument of Portage should not be understood as somehow divorced from the professional hand that introduces and develops it, and that the development of Portage programmes cross-culturally and of professional practice skills necessarily includes an inner journey, a questioning of self, as well as a concern with programme adaptation and change.

I also believe that a concern with the *processes*, rather than simply the prefigured outcomes of Portage development, has substantial implications for the future development of Portage programmes and related expert practice. In the final chapters of this thesis I also discuss how a systemic practice perspective entails considering issues such as the nature of power relationships in both practice and research, the processes of knowledge acquisition, use and exchange and the fostering of joint-action. Consequently, I shall also argue within this thesis that a systemic stance to practice may



help to discourage viewing colleagues and those we, as experts, work with as ‘others’, to be professionally practised upon, who are necessarily in need of change and improvement. Rather, it may encourage a greater recognition and acceptance of difference and diversity, and openness to new ideas and knowledge.

Finally, I should add that this thesis is not a dismissal of the importance of the instrumental aspects of expert practice regarding Portage, nor is it a criticism of Portage itself. I believe that Portage has many strengths which as I shall describe in reference to my own experiences in Namibia make it a very viable option to supporting families with children with special needs in developing countries. Indeed, I offer this thesis as further evidence that Portage can fulfil that promise, particularly when the practices of those experts who are assisting in its application are understood and shaped by systemic concerns.

### **1.1.2. The Aims Of The Thesis**

As a practitioner-researcher, my purpose in writing this thesis is to explain and share with the reader the changes in my own understanding and knowledge regarding both Portage and my praxis as an educational expert working within a cross-cultural context. The overall structure of this thesis is intended, through a reflexive auto-ethnographic narrative, to trace the profound professional experiences and personal learning transformations of understanding brought about through both my working as an educational psychologist with families and local colleagues in Namibia, and also later through my continued research into and reflection upon that experience and associated expert practice issues. I explicitly examine my involvement in the development of a programme which became known as the Engela Portage Programme as it was this experience which initially acted as a trigger for my action research interests into the issues of expert practice within cross-cultural contexts. My involvement in the Engela Portage Programme also led to my own further professional development and to my establishment of a dialectical form of individual action research-based educational knowledge. After Carr and Kemmis (1986, p. 34), by dialectical I refer to how thought and action (theory and practice) are mutually constitutive, in a living process of interaction with a continual dynamic reconstruction of thought and action in “every real social situation”. Consequently, many of the key themes and claims to knowledge that I make, as part of my own educational theory, emerged enactively and dialectically from



my reflections upon my expert practice and as part of my continued individual action research. In this manner, these emergent themes also influenced the kind of literature I chose to engage with and the reader will meet most of this literature, cumulatively, throughout the course of my thesis.

I also intend this thesis, as educational research, to make a further original contribution to educational knowledge and so inform educational decisions and further improve educational practice. In particular, this thesis aims to demonstrate the following original claims to educational knowledge that I make regarding the process of change related to expert involvement in the implementation of Portage programmes in the cross-cultural context of developing countries. These claims arise out of my practice-research and represent the current stage of my own developing professional understanding and knowledge:

1. That broader, epistemological questions about the expert practice of Western consultants need to be more openly acknowledged as a crucial aspect of the process of change regarding Portage programme development, beyond the usual focus upon questions about the techniques and technical details of programme adoption and adaptation;
2. That Western experts importantly need to begin to reflexively and reflectively question their own beliefs and knowledge regarding their practice and Portage and consider those aspects of their practice and the programme which legitimise certain ways of understanding while also subjugating others;
3. That within the cross-cultural contexts of developing countries, expert practice related to Portage programme implementation should be understood *primarily* as concerned with the processes of interpersonal interaction, of how to foster these relationships and especially the challenges of engaging with difference within relationships;
4. That reflective and reflexive practice and a focus upon the processes of interpersonal relationships may ensure that expert practice also fosters reciprocal processes of



exchange, leading to a more ethical, educational and practical process of change in which new ways of seeing and understanding may emerge;

5. That these relational processes of expert practice and change can also be usefully theorised within the postmodern paradigm and particularly by drawing upon social constructionist, systemic ideas, which provide a conceptual framework for experts to improve their own practices related to the process of change.

### **1.1. 3. Definition Of Key Terms**

Throughout this thesis I have employed several key terms which, at this stage, I will attempt to more clearly define. In regard to several of the terms to which I refer below, I am aware that I have used them as textual devices, that is as a narrative convenience for conveying constellations of ideas and concepts, although I am also mindful that their use may sometimes imply an over simplistic duality.

#### **Technical**

Above, I have suggested that I am concerned that the literature related to Portage privileges research that focuses upon the *technical* aspects of Portage implementation, rather than wider social and relational issues. I have employed the term ‘technical’, which I understand in a sense which approximates closely to Schön’s (1991) view of a technical rationality. Schön (1991) referred to a ‘technical-rational’ model, in which practice and research based theoretical knowledge acts as the foundation for expert practice because of its assumed superiority over other forms of knowledge generation, such as practitioner and experientially derived knowledge, and as it is believed to provide the most accurate picture of the ‘true’ nature of the world. My understanding, therefore, is that a technical approach characterises expert practice, in which the practitioner attempts to implement Portage non-reflexively and usually unilaterally, without explicitly conceptualising or reconsidering the process in more inter-personal, enactive, recursive and dynamic terms. A technical view also privileges standardised and orthodox methods, in which rules and procedures are seen as largely invariant in different contexts, taking the place of what is perceived as a more dynamic and synergetic process, such as those involving collaboration and negotiation as exemplified by the concept of praxis, which I will describe in Chapter II.



Technically orientated expert practice which privileges predefined ends and seeks certainty was also succinctly defined by Usher et al., (1997, p.126) as:

“the solving of technical problems through rational decision-making procedures based upon predictive knowledge. It is the means to achieve ends where the assumption is that the ends to which practice is directed can always be pre-defined and are always knowable”.

However, as I shall refer to in this thesis, even such apparently rational technical approaches with their predefined goals and means should not be understood as neutral, as they also reflect underlying values and beliefs about what is valuable and desirable. Consequently, the striving for predefined outcomes, such as those characteristic of a technical approach, have to also be questioned in Portage development, so that a scrutiny of the means employed, that is of the implementing practice, also becomes crucial. Portage development is essentially therefore never solely a question of technical competence, but also of questioning practice values and ultimately also a question of ethics.

### *Developing and Developed Countries*

Within this thesis, I have also employed, rather self-consciously, the term ‘developing countries’ to refer to countries within Africa, much of Asia, many countries within the Pacific region and Latin America, which are popularly understood to be economically ‘underdeveloped’, that is less industrialised, relative to those capitalist countries deemed to be developed. I refer to ‘developed countries’ as those not popularly deemed to be developing and, in general usage, this terms appears to refer to the US, Canada, Western Europe, Japan, Australia and New Zealand, etc. However, I acknowledge that these terms are very problematic, not in the least because in referring to the relative economic status of countries, they also obscure a host of differences between the countries that they subsume under these headings. Within the present international development literature and discourse, these latter terms seem to have replaced the earlier use of the phrases ‘First World’ and ‘Third World’, which appear to have fallen out of fashion, presumably because of their explicit hierarchical implications and possibly because of their association with the historically earlier Cold War political division related to East-West alignment and nonalignment. Clearly, however, ‘developed/developing’ are also value laden and so are far from ideal, as they too include implicit assumptions about progress,



and so forth. Indeed, the development literature, possibly in an attempt to avoid these difficulties, occasionally employs a bewildering range of euphemisms including ‘high-income’ countries and ‘low-income’ countries (Chabbott, 1998), ‘less industrialised’ countries ‘industrialised’ countries, ‘the North’ and ‘the South’, (Little, 1996), ‘developed’ and ‘less developed’ (Stubbs, 1993), none of which appear to have proven to be generally popular. I have therefore chosen to continue to employ those terms that seem to enjoy present currency and are frequently adopted within the literature of the United Nations and its various agencies.

### *Western and non-Western*

Similarly, I have referred to the ‘West’ and ‘non-West’, terms that I understand and have used to approximate to ‘developed’ and ‘developing’. However, I have also employed the terms the ‘West’ and ‘Western’ in the context of this thesis to refer to ‘modern’, ‘dominant’ and ‘conventional’ rationalities, knowledge systems and practices derived from ‘developed’ countries. Conversely, I have used the term ‘non-Western’ to equate to ‘indigenous’ and ‘local’ knowledge systems and beliefs. I shall also provide a fuller description of ‘modern’ and ‘modernism’ in Chapter II. After Apffel-Marglin and Marglin, (1996, p. 34), I understand the term ‘Western’ in a relational manner, in which “A system of knowledge becomes dominant from the perspective of other systems of knowledge”, rather than the term referring primarily to a geographic region. In this sense, the term ‘Western’ may also refer to people from developing countries who have adopted, or espouse in their behaviour or practices, Western standards, ideals, conceptualisations and expectations. Within some sections of society in ‘developing’ countries, the embracing and importation of ‘Western’ ideals has and continues to be actively welcomed, no doubt for multiple and complex reasons. Various authors have conjectured that these reasons might include the desire to adopt ‘badges’ of modernisation; a sense of promoting national esteem; to cater for the needs of a small, ‘Westernised’ elite; as solutions to non-traditional societal problems (Einterz, 1996; Kalyanpur, 1996); or due to Western-trained professionals who have returned to their countries with aspirations for services and working conditions they had grown accustomed to while training and working abroad (Rathgaber, 1985; Miles, 1989; Helander, 1992; Miles and Miles, 1993).



### Special Educational Needs and Disabilities

I have used these various terms throughout this thesis primarily to describe children with physical, hearing, visual and intellectual impairments as perceived and judged by the community in which they live. Within the context of Namibia and the Engela Portage Programme I have also referred to children with *severe* special educational needs, developmental delay and disabilities and I understand these terms to mean that their impairments were such that they were barred, either officially by school staff or informally in the judgement of their families, from attending their local primary school or nursery facility. Within the context of Namibia, the term ‘learning difficulties’ refers to intellectual impairment.

#### 1.1. 4. The Structure Of This Thesis

The overall structure of this thesis is the product of a considerable amount of deliberation with numerous earlier drafts produced before the present structure emerged. The struggle I experienced in arriving at what I considered to be a suitable structure reflected several important considerations.

Firstly, as the reader will later note, the course of my research did not follow a conventional path. I did not arrive in Namibia with the intention of conducting research. Rather, I understood my role solely as a practice endeavour in which I expected to ‘share’ my professional skills with colleagues and establish a new programme within the department I was to head. However, it was the richness of my practice experiences coupled with the insights I gained from the encountered challenges that spurred my interest in thinking more deeply about my practice, the Portage Programme and to the idea of research. Furthermore, the nature of that research was such that it did not occur during my placement in Namibia, but commenced after my departure and following further reading into Portage and expert practice issues, and also through my researching into research. Moreover, I understand my research to have importantly continued during my writing and re-writing of, thinking and re-thinking about, this thesis.

As the reader will also note, my research is in the realm of *exploring ideas* rather than in the collection and analysis of ‘data’. As such, I required a structure to this thesis which would not only allow me to describe the course of the transformations in my ideas but to also include descriptions of my initial experiences of practice and my experiences of



learning both of which contributed to my changes in thinking about my practice. Clearly, considering the manner in which my practice-research emerged and how it proceeded over several years, together with its focus on ideas rather than ‘hard’ data, a more orthodox structure to this thesis would have been inappropriate. Consequently, as the structure that I have chosen is intended to chart the unique course of my own ‘experiential journey’ as a practitioner-researcher, this thesis has taken a non-conventional form.

At this stage, in order to explain the thesis structure further, I believe it may be helpful to the reader if I describe the sequence of chapters and how they are interrelated.

Chapter I is a fairly conventional chapter, in that it explains: why the research was undertaken; indicates the trigger for the research; defines the research project; overviews the current literature regarding Portage and Portage expert practice; and justifies the importance of the research, etc.

Chapter II might in a more conventional thesis have been related to the methodology of the research. However, within this thesis this chapter represents an expansion beyond a focus simply upon methodological issues to include an exploration of potential conceptual frameworks. I specifically consider the ontological and epistemological questions related to modernism and postmodernism, both of which are very pertinent to understanding the nature of this thesis. In tracing my own understanding of these issues I also chart the course of my own learning about research and explain my eventual arrival at a research methodology which represents a rather transgressive form of individual action research which embraces self-reflexivity. It is very important that the reader understands these issues as they not only provide a justification for my chosen methodology, but they are intended to assist the reader in understanding how the later chapters should be viewed and judged.

Chapter III describes the initial practice context within Namibia in which I began to form new ideas and to think differently about my practice. Chapter III therefore begins to contextualise the claims to knowledge I make in Chapter VI. It also provides significant practice details which I return to reflexively analyse in the following chapters.



Chapter IV represents a further stage in my practice-research, that of my post-Namibia reflexive analysis. It introduces the reader to second-order systemic ideas and social constructionism; practice frameworks which I came to learn about and understand following my departure from Namibia. Chapter IV takes the reader back to reconsider aspects of my involvement with the Engela Training Centre and the Engela Portage Programme and subjects these to a reflexive analysis.

Chapter V broadens my post-Namibian reflexive analysis further. For example, this chapter considers the ‘given’ underlying assumptions about the nature of ‘culture’; views Portage itself as a cultural phenomena; and explores Western cultural assumptions, about childhood, child development, disability, etc. which are frequently considered in the West to be universal and transcultural. Chapter V therefore also demonstrates how reflexivity on cultural issues may also represent a useful resource to inform and challenge our understanding of expert practice.

Chapter VI is concerned with synthesis. It brings together issues, themes and ideas which have emerged within each of the earlier chapters by framing these within five key propositions, or claims to knowledge, that I make regarding my own expert practice. However, Chapter VI is not written to suggest any sense of closure, but rather to detail my present thoughts about expert practice. As such Chapter VI also considers the tensions and contradictions inherent in my present understanding of a systemic epistemology of expert practice, which I hope will continue to both unsettle and to also drive my thinking about my practice onwards.

## **1.2. A Review Of The Literature Regarding The Portage Programme**

### **1.2.1. Portage - The Background**

The Portage Programme, also referred to variously as the Portage System (Shearer, 1990), the Portage Model (Bijou, 1990), the Portage Project (Herwig, 1990), and, in its various published teaching material forms, as the Portage Guide to Early Education (Shearer, 1990), the Portage Early Childhood Education Project (Shearer and Shearer, 1972) and the Portage Home Teaching Program (Cameron, 1997), or more simply as ‘Portage’, was originally developed in 1969 at the University of Wisconsin, Portage,



USA, from which it takes its name. The programme sprang from an initiative resulting from the Head Start Programme to test and develop innovative early education programmes for pre-school children and children up to six years of age with developmental delay, or those deemed to be at risk of delay (Shearer and Shearer, 1976; Shearer, 1988), which it was hoped might lead to comprehensive models that could be replicated by others (Jesian, 1984). As a service delivery model, Portage at that time was unique in emphasising the participation of parents in the training of young pre-school children with disabilities and some have even been moved to describe its foundation as 'brilliantly innovative' (Mittler, 1996). Indeed, Portage went further, in that its intention was to teach parents in their own home to use behavioural modification techniques to teach their own children. Before the emergence of Portage, most formal services to children with special needs typically consisted of centre based provision. Furthermore, Portage had also been designed to cater for children with a very broad range of special needs (Karnes and Reid-Zehrbach, 1977).

In relation to its development, Portage arose at a time when research evidence was first emerging that children with special educational needs could benefit from support programmes which included early intervention and parental participation, particularly when offered within the child's own home, and indeed such evidence has continued to accumulate since the late 1960s (e.g. Cunningham and Jeffree, 1971; Burden, 1979; Cunningham, 1985). Typically, research claims have highlighted the benefits of such programmes to include: improvement in the rate at which young children reach their developmental milestones; positive changes in parental attitude towards their children; improved general family dynamics and relationships, such as a reduction in marital discord; greater support for the family; and improved chances of children subsequently entering mainstream education. However, concerning the original Portage model, it appears that, at least in part, its development was also spurred by economic considerations, with the programme being proposed as a cost-effective solution to meeting the difficulties of providing supportive services to families living in a rural, low population district of the country (Bijou, 1988). Whatever the trigger for Portage's development, since the model first emerged within the United States and later in parts of Western Europe, it has gradually evolved and been modified to reflect the current research and best practice related to early and home-based intervention for children with special educational needs.

### **1.2.2. Portage - General Operating Principles**

Fundamentally, Portage is a problem-centred, home-based support system that advocates family members working in partnership with Portage programme staff. Portage programmes include material developed for use by family members and a positive monitoring system, which is employed to guide Portage staff in their attempts to support and systematically teach family members the direct instructional skills they need to teach their children. The conventional Portage model, as originally practised in the United States (Shearer and Shearer, 1972) and later within the United Kingdom (Cameron, 1982), is essentially characterised by key programme and operational features, which I have outlined below.

Trained Portage workers, also variously known as Portage home visitors or Portage volunteers, visit the families of children with special educational needs in their own home, usually on a weekly basis. The Portage workers themselves may be drawn from a variety of backgrounds including professionals such as community nurses, health visitors, social workers, therapists and teachers, although Portage programmes also operate using non-professionals and, while many Portage workers serve as paid employees, others are volunteers.

Within the family home, the Portage worker works in partnership with a member of the child's family to teach the child with special educational needs key skills in those areas in which they have been identified to have developmental delay. The Portage materials tend to be organised so as to identify several developmental areas or skill groups, which typically include socialisation skills, self-help skills, motor skills, cognitive and language skills. Within the United States and the United Kingdom, Portage programmes have also developed colour coded Portage checklists for each of these skill groups, with the whole checklist typically listing between 500 to 600 separate behavioural items or skills. These skills are presented and ordered within the checklists in each of the developmental areas and approximately developmentally sequenced from birth through to six years of age.

Typically, during the first home visit the Portage worker, using the Portage checklist, makes an initial baseline assessment of the child's level of ability in each of the key developmental areas of the checklist. This assessment involves both asking questions of



the child's family and, together with the family, observing the child as s/he completes various activities related to each listed behavioural skill. This assessment procedure is designed to provide a baseline of the child's skills against which to measure future developmental progress. When the child has been observed to be able to successfully demonstrate a particular behaviour related to an item from the checklist to the required standard, this item is then ticked and the next item considered. In this way the Portage checklist is designed to represent a positive record of what the child is able to do, as well as provide future teaching targets for the child.

The Portage worker discusses and agrees, with the child's family, possible teaching targets related to the skills that the child needs to acquire or develop further. Once the initial baseline assessment has been completed, a priority teaching target, usually taken from the checklist, is agreed upon with the child's family. Frequently, as new teaching targets are too difficult for the child to obtain in the short term, a behavioural task analysis is conducted to identify more readily obtainable, individual teaching steps related to intermediate skills, which the child will need to achieve in order to eventually reach the longer-term priority teaching target chosen. It is these short-term teaching steps which often represent the weekly teaching targets that the child's family agree to aim for when teaching their child. The Portage worker will then work with usually one specific member of the child's family who has agreed to take prime responsibility for teaching the child. Together, the family member and the Portage worker plan a specific teaching method by which the family member will teach the child, related to the specific individual teaching step.

The process of teaching the family member to teach the child, can be summarised as consisting of several steps, although the steps typically change over time, as families gain confidence and develop their teaching skills. Firstly, the Portage worker models the new teaching method by completing the teaching activity with the child, while the family member observes. The family member then copies the new teaching activity, working with the child, while the Portage worker observes and provides further advice as necessary. This is an essential feature of the Portage method, as the primary role of the Portage worker is to teach the family member and not the child. Once the teaching method is agreed upon and understood by the family member, as demonstrated by their ability to teach the child in the agreed manner, the teaching procedure is formally

recorded on the Portage Activity Chart for the family member to refer to later if necessary.

The family member teaches the child for an agreed number of sessions each day over the next seven days. The Portage Activity Chart also contains a record chart for the family member to graphically record the outcome of each of the several individual teaching sessions, each day. Typically, the child is taught using the agreed teaching method four or five times a day, with each teaching session taking a few minutes to complete. This recording usually entails placing a tick on the Chart for each successful teaching sessions, that is, when the child has managed to achieve the set teaching target without difficulty with the agreed degree of help or with no help. If the child requires more help than had been previously agreed necessary as part of the teaching method to obtain the teaching target during an individual teaching session, then this is also recorded on the Chart usually with a circle for that particular teaching session.

The Portage worker returns to the child's home after seven days, to review the child's progress as recorded on the Chart. Typically, the Portage worker will also repeat the activity with the child at the beginning of the visit, to assess if the child is ready to move on to the next teaching step. This information is then used to agree upon the next teaching target for the following week. For children who are particularly delayed or who have very severe difficulties, this may often consist of retaining the same teaching target, but reducing the amount of help the child is given to reach the target. Again, the revised or new teaching method to be used by the family member is agreed upon, modelled by the Portage worker, copied by the family member and then recorded onto a new Activity Chart for use during the following week's teaching.

Each completed Portage Activity Chart and Checklist therefore provides a positive monitoring scheme for each child's progress and a record of the activities carried out by the child's family and Portage worker. Usually, Portage workers work as a team within a Portage service, which may consist of a number of Portage workers. These Portage workers meet weekly as a group to receive supervision from a Portage Supervisor, often an educational or clinical psychologist, who manages the Portage service at the local level. Sturmey and Crisp (1986, p. 141) equated the Portage Supervisor to the 'Behavioural Consultant', arguing that one of the advantages of such a hierarchical



structure was that it, “enabled the Behavioural Consultant to intervene with a large number of clients indirectly”. At these regular supervision meetings, the teaching outcomes of each of the children enrolled in the programme are individually discussed, collectively as part of the Supervisor’s management and monitoring role of the work of each Portage worker. Also, any problems that the child’s family or the Portage worker might have identified during the previous visits are relayed to the team and considered, so that possible solutions might be collaboratively sought within the team.

### **12.3. Portage As An International Phenomena**

Jesian (1984) described how, following the reported success of the Wisconsin Portage Project, the model was extensively replicated throughout the United States, so that by 1984 there were a reported 184 Portage services in North America including its use in non-Western communities, such as with native American families. Given this apparent success of Portage, questions were inevitably also asked regarding its effectiveness outside of the United States (White and Cameron, 1988).

Bijou (1988) also reported how the perceived success of Portage throughout the United States led to a wider international interest in Portage and eventually to its development world-wide, with the first international attempt to ‘replicate’ Portage taking place in Peru in 1976 and later that year in both the United Kingdom and Japan (Shearer, 1998). During the 1980s, Portage programmes continued to spread internationally, with this rapid growth leading to the founding of the International Portage Association in 1986. The establishment of the International Portage Association also represented an attempt to ensure that the world-wide use of the Portage model was accompanied by a consistent commitment to quality information, which was both educationally and psychologically sound, while keeping information at a basic and accessible level for ordinary families. Since first established, there has now been at least eight International Portage Association conferences, held to share information and to promote the further world-wide development of Portage.

Currently, by the International Portage Association’s own estimate, Portage is operating in some 90 countries world-wide and has been translated into over 34 different languages (Yamaguchi, 1998). Indeed, Portage has been said to have had “a spectacular international impact” (Sturmey, et al., 1992, p. 378) and some international education

consultants have even considered Portage as potentially offering, with slight modifications, a “panacea” (Brouillette and Brouillette, 1990, p. 53) for addressing the needs of developmentally delayed children and their families. Inevitably, this development of Portage as an international phenomena has also led to pressures on the original Portage model to accommodate a wider range of cultural values and practices (Loftin, 1988; Brouillette and Brouillette, 1990; Shearer, 1998). However, according to Cameron (1997, p. 27), “The essence and advantage of Portage is its ease of adoption and adaptation to various populations and cultures”. Perhaps it is that alleged ease, with which Portage can be adopted and adapted cross-culturally, as described by Cameron, together with the sense of international urgency fuelled by the claims that families are receiving insufficient assistance with the education and rehabilitative care of their children with disabilities (O’Toole and McConkey, 1995), that has at least in part accounted for Portage’s success and its increasingly wide international and cross-cultural application.

In the review of the Portage literature below, I have referred to the research related primarily to the international application of Portage, particularly to non-Western countries. This review demonstrates how the research literature has been preoccupied with questions over the technical and programmatic aspects of Portage’s practical implementation, to the neglect and the absence of any substantial reference to questions of non-technical expert practice. As I will show, there has also been generally an omission of any inquiry into the reflective and reflexive practice of Portage experts, particularly those from a Western background, and very little research into practice questions regarding the complexities of working with others from different cultures, or how experts might consider engaging with difference. Indeed, at times, this seems not simply to be a neglect of these wider systemic and cultural questions, but perhaps also a failure to recognise these as worthwhile concerns in the first place. As the reader will note, some of the literature appears to attribute the problems that families, and particularly mothers, have had with Portage as evidence of a failure upon their part, rather than these difficulties being related to the methodology of practice by which Portage was introduced and how the programme has been understood by experts. I believe that it is precisely this rationality which is encouraged by an excessive concern within the Portage literature for the technical.



#### **1.2.4. A Critical Review Of The Research Literature Related To Portage's International Application**

Some of the earliest collective accounts of Portage's application internationally were by White and Cameron (1988), in which details of its application in Japan, India and the Gaza Strip are mentioned, and also within Yamaguchi, (1989) in which Portage's application in various Asian countries, Jamaica and South America are included. In many respects these publications, both of which represent the proceedings of Portage conferences, also set the tone for those that followed. That is, in addition to the inclusion of research reports, which referred to modifications, adjustments and extensions to Portage programmes within the West, they also included a series of reports about how Portage had been implemented world-wide. As has been the tradition of Portage research, such as that carried out within the United States and the United Kingdom, the style of most of these international reports tended to also be technical in focus, largely concerned with Portage's programmatic features. Typically, the concerns of such first-order research has included inquiring into questions regarding: how the Portage materials might be adapted; the recruitment of local people as Portage Workers and the content, scale and type of training provided to them; the relative effectiveness of the programme in teaching new skills to children with developmental delay; the results of experimental comparisons between groups of children; and how Portage relates to other local services; resource mobilisation; special needs screening; etc. (e.g. Kohli, 1988a, 1988b; Thorburn, 1988a; Yamaguchi, 1988a, 1988b; Sturme, et al., 1992).

Very few of these early reports were concerned with any significant reflection upon either the wider cultural issues of change that the implementation of these programmes brought with them or with questions of professional expert practice per se, such as the development of working relationships with colleagues and others. However, Kohli (1988a), as an aside to the main focus of the report upon experimental data gathered within India, also referred to some attitudinal changes in regard to the child-rearing practices of those involved in the programme, including local professionals, which were described as in a 'positive direction' although these were not discussed further. Some issues of cultural difference and expectations were also alluded to, as Kohli described how some parents "often feel offended" (p. 67) when questioned by the Portage Workers as to why they did not complete the Activity Charts. Kohli also reported how parents provided "lame excuses" (p. 67) for not attending Portage, when it was provided not

within their homes but as a centre-based provision, although again these important issues were not reflected upon in any depth.

The report by Zaman and Islam (1988), in regard to Portage's application to Bangladesh, similarly also demonstrated the primary concerns of the research upon instrumental aspects of the adaptation and implementation of Portage. Although Zaman and Islam reported what appeared to be a relatively high percentage of mothers who discontinued with the programme, the problems encountered by these mothers were not explored. Rather, Zaman and Islam chose to focus upon the effectiveness of teaching children by the professional 'advisors' who worked with the child alone, "without any help from the mother" (p. 108). According to the authors, the advisors proved much more effective in teaching the children, judged in terms of the number of skills learned by the children, when compared to the mothers who taught their own children. Zaman and Islam (1988, p. 110) conjectured that this might be due to a variety of reasons including the mothers:

"lack of awareness of their children's problems, less enthusiasm and inability to carry out instructions due to too many domestic work at home. False promises by the mothers as revealed by the reluctance to keep proper activity chart (sic)".

Interestingly, despite these apparent problems in working with local mothers, Zaman and Islam concluded that Portage, when effectively adapted, "is likely to be successful in training mentally handicapped children at home, in classroom situations and in "Distance training program" (sic)" (p. 112). However, from a less technical and more culturally sensitive and systemic reading of the report, the problems encountered by the mothers who took part in the pilot would not seem to bode well for a programme which is designed to be family focused and to primarily involve family members in teaching their own children in their own homes. Notably absent from the report were considerations of issues regarding the relational aspects of how Portage was introduced and key questions of cultural difference, aside from the adaptation of Portage Checklist items. Also, despite the problems encountered by the mothers, no reference was made to their views about the programme. The cultural issues alluded to were in effect portrayed as obstacles that could be circumnavigated by appropriate adaptation by the experts and improved motivation on the part of the mothers, rather than as opportunities to learn more about local needs and modify an understanding and application of Portage beyond



simply the translation of the material and the addition/subtraction of behavioural teaching targets.

Inciong (1988), in describing the adaptation of Portage to the Philippines, also outlined the technical and systematic nature by which Portage was planned for and emphasised the statistically pre- and post-test gains of the children who participated. However, the report also referred briefly to how this process ‘facilitated communication’ among otherwise disparate organisations and led to ‘enthusiastic’ involvement of the children’s parents. Inciong additionally included some reference, albeit also relatively briefly, to parental satisfaction with the programme and a belief that interactions with their children had improved, although these issues were not discussed in any detail in the research report. Little reference was made to the wider interpersonal processes of negotiation involved, or the important cultural challenges and issues raised by the use of Portage.

Although exceptions to the preponderance of technical issues particularly within the earlier published international Portage literature are very few, Brouillette and Brouillette (1988) presented a more inter-relational understanding of the role of Portage. The authors referred to how Portage could be used as a vehicle by which parents, who had benefited from the programme, might support other parents of children with learning difficulties, with an emphasis on the social support benefits of Portage. Whelan (1988), in describing the introduction of Portage to the republic of Korea also raised issues of cultural difference and social status, by referring to the fact that, since the Portage programme was culturally allied to the United States, in some cases this “foreign smell is too strong” (p. 174), particularly when introduced by a ‘foreigner’. However, these opportunities to consider these inter-cultural and systemic issues and their implications for practice were again not followed through.

Later research reports presented at International Portage Association’s conferences regarding Portage’s international application also continued to predominantly emphasise the technical aspects of the Portage programme. Brouillette and Brouillette (1990, p. 60), for example, in characterising Portage in ‘modular’ terms, argued for a “brief stand alone guide or chapter in revised editions of Portage manuals on ways in which one can adapt the Portage Model to a variety of cultures and settings”. Cameron (1990, p. 15) likewise emphasised the “power of the model to help parents and children and its

robustness in transcending geographical, linguistic and cultural barriers". Kohli (1990) once more also stressed the actuarial and programmatic features of the Indian Portage programme. Similarly, Mariga (1990) chose to outline the systematic and programmatic steps which she believed were needed to successfully plan a home-based programme in developing countries.

However, there was also evidence that some of these more recent Portage international reports were beginning to include a broader recognition and understanding of the social and interpersonal effects and potential of Portage, albeit more in relation to its application within the United States and the United Kingdom. For example, several reports referred to the importance of wider relational issues of Portage workers supporting parents and the counselling role some workers were sometimes drawn into (Bijou, 1990; Cameron, 1990; van der Meulen and Simpa, 1990). Indeed, Cameron (1990, p. 17) concluded that "after almost two decades of basic research, there is a strong argument for moving forward beyond the somewhat narrow child measures... [to] assess the effect of the Portage program on the child within the family". Evidence of a concern with relationships in the Portage literature was also apparent in the reports of Sampson and Wollenburg (1990, p. 28), who described the importance of 'personal rapport building' and "The open and honest exchanges of ideas and concerns that are shared between home visitors and families". Similarly, the report by Wolfe (1990) considered the principles behind a parent-focused approach and how Portage workers might behave so as to ensure their practice included the development of listening skills. Nevertheless, although these reports appeared to argue for a consideration of the wider relational aspects of Portage, again these were seen primarily in terms of *the programme* and what the programme's effects were, rather than viewing this as also a question of expert values, assumptions and characteristics, all of which shape *expert practice* and thereby also the crucial dynamics of personal interaction that occurs in contexts of cultural and social difference.

For example, while Cameron (1990) referred to 'empowering people' and argued that further research was needed into the relationships between Portage home teachers and parents, this seemed to be primarily understood in terms of the additional emotional support provided to parents and to assistance with non-educational problems, as part of a 'parents as partners' approach. Again this appeared to be emphasising what the



programme could deliver, rather than questioning expert practice per se. Nevertheless, of relevance to this thesis and my concerns with expert practice and Portage, Cameron (1990, p. 21) also commented on how “surprisingly little has been done to show how people should begin to “empower” others”. Cameron continued to suggest that Portage might also provide “an operational description of how support professionals and parents can not only work successfully together, but also *learn from each other* in the process” (p. 21, emphasis added).

The research and review of the Portage literature by Sturmey et al. (1992) appears to represent one of the most comprehensive analyses to date of the range of issues which arise during Portage’s cross-cultural application. Their research concluded that, in most countries, the implementation of the Portage model had required some degree of modification and that, in some cases, this was substantial and reflected “the available resources, the service infrastructure and local demography” (p. 391). For example, in relation to the development of Portage within India and Bangladesh, they commented upon how the research had revealed how the ““demographics and infrastructure are so different that many of the assumptions implicit in Portage cannot be met” (p. 381). By ‘assumptions’, Sturmey et al. (1992) appeared to refer to the presence of other supportive services within the community and to the technical problems within India and Bangladesh of ‘informal organisation arrangements’. They also highlighted the difficulties created for referral to the Portage services, due to the vast size of the countries’ populations, together with high mobility, the problems of rapid urbanisation and with the lack of service structures to detect children’s disabilities. As such, Sturmey et al. (1992) seemed to understand Portage’s implicit ‘assumptions’ to be related to the availability of other material services and physical conditions, rather than in terms of the values and beliefs, such as, for example, the difference in the understanding of the concepts of disability and childhood. Again, the research report was concerned primarily with how the problems with material resources impinged upon the development of Portage services and subsequently led to modifications of the model.

Regarding the need to modify the content of the Portage curriculum, Sturmey et al. (1992) quoted Baine (1988) in criticising the content and appropriateness of some of Portage’s original developmental assessment and curricular materials for use in developing countries. The report suggested that more ecologically valid skills, such as

those related to collecting eggs, etc. were far more suitable for children with disabilities in developing countries. However, the research article made no reference to how the children's families themselves understood the curricular content or how culturally meaningful these items were to them, or whether their views and aspirations for their children concurred with those of Western experts espousing an ecologically orientated curriculum.

In reference to the implementation of Portage in Jamaica, Sturmey et al. (1992) described how very few modifications were believed to be necessary, although the programme was used with a wider range of children and young people and included all who were considered to be disabled. Although Sturmey et al. (1992, p. 384) referred to the discrepancy between the number of people with disabilities highlighted in the local community by a standardised screening survey and the "relatively little awareness of disability amongst key informants" from the community, this evidence of a possible important difference in the local cultural understanding regarding disability and the implications for Portage were not commented upon. Rather, the research report again primarily focused on the social and material conditions in which Portage had to operate, including the absence of fathers in families, the problems of rural transport, and so forth, all of which had a bearing upon the technical development of the local Portage programme. Indeed, in the report's conclusion, while some references were made to the necessity of Portage to adapt to cultural differences between groups of families as evident in different family structures, their variation in literacy levels, etc., the report again continued to highlight the largely technical challenges to Portage as the focus of future research concerns.

Since Sturmey et al.'s (1992) research, there has been some further evidence within the international Portage literature of a growing recognition of the need to take into account how different parents may variously understand and perceive their own and their children's needs (Mittler, 1996), and issues concerning inter-personal dynamics such as 'empowerment' are also occasionally cited (Nunkoosing, 1996). Nevertheless, the bulk of the literature continues to overlook the important key questions of the details of expert systemic practice related to Portage implementation and development. For example, although Kaderoglou (1996) referred to the importance of listening skills, as part of the development of a 'personal relationship' between parents and Portage professionals,



ideas about how practice might be directed to develop this relationship were absent. Also, Sturma et al. (1996, no page number), in relation to the introduction of Portage in the Czech republic, reported that parents found the use of the checklist burdensome and that they:

“had the feeling - we are being checked on. In the home teacher they saw an authority figure who would order them directly, tell what they would have to do in spite of the fact that on first visits we had explained to them that our role was as consultants”.

However, how this particular understanding of the Czech families was catered for by the Portage programme, and how the consultants in their practice considered how to go about negotiating their role with families in such circumstances, was again overshadowed by the actuarial programme details within the report.

Similarly, although the reports presented at the 1998 International Portage Conference held in Hiroshima included some further references to the need to develop and to work in partnership with parents (Herwig, 1998; White, 1998), a noticeable schism was apparent between the presentations of some Western researchers and those researchers from developing countries, in whose reports more technical concerns continued to prevail (e.g. Begum, 1998; Guven, et al., 1998; Inciong, 1998; Krishnaswamy, 1998; Marangoz, 1998; Salavia, 1998; Tasaka, 1998; Yahagi, 1998).

Within the research literature relevant to the United States and the United Kingdom, I have found that some Portage studies, although few in number, have continued to raise concerns over the predominant interest of much Portage research with technical and outcomes measures, rather than process details or with its ability to support materially disadvantaged or ethnic minority families. For example, Bronfenbrenner (1974) cautioned that some parents, especially those who were living in very disadvantaged circumstances, may be neither willing nor able to participate in a home-based service such as Portage. Russell (1985) also acknowledged that parents might initially prefer for the child to be treated outside of the home and that working with the family, such as through a Portage service, may require preparation and counselling.

Echoing the concerns I have raised regarding Portage's expansion and understanding internationally, Affleck et al. (1982) also noted that, despite the supposed benefits of parent-child interactions acting as the rationale of such parental support programmes, most evaluations of programmes had shown an "Exclusive concern with detection of intervention-related changes in developmental status" (p. 416). Clearly, Affleck et al. (1982) were also noting a neglect of the interpersonal processes between parent and child, such as the "growth of mutual attachment and reciprocity" (p. 416), as well as most research overlooking the interactional processes of the "catalyst for change (the parent-professional relationship)" (p. 416). Concerning the manner in which parents are encouraged to work with their children, McConachie (1983) was also concerned at the possible consequences that might result from the too prescriptive application of Portage and the danger of over-direction of parents, with the possible distortion in the child-parent relationship that might result from too much focus upon teaching and developmental gains.

Also significant to the key themes of this thesis, Russell (1985), in an overview of several evaluations of Portage programmes, advocated the need for supporters and practitioners of Portage to be openly critical of the model to which they may be highly committed, so as to ensure that the model both developed and remained adaptable to new challenges. Russell commented that the reported successes of Portage programmes appeared to relate not solely to any one element of the Portage model, but to the interaction of the programme's key features and the fact that it taught parents and children success. Importantly, and in contrast to the claim made by Brouillette and Brouillette (1990) regarding Portage, Russell concluded that Portage "cannot be a universal panacea" (p. 25).

Mittler and Serpell (1985), in reference to Portage, specifically also cautioned that the importance of Portage may rest with the less technical and less tangible aspects of the programme, such as the nature of the supporting and befriending relationship between the Portage service providers and parents and they called for greater 'sociocultural competence' of professionals. Mittler and Serpell (1985) also referred to research in the United Kingdom which raised concerns that an over-emphasis on the technical and teaching process may lead to an 'educalization' effect similar to that of medicalisation, and that parents may begin to judge their own performance by their child's learning



successes or failures. The authors also claimed that, in some circumstances, such as when working with less literate parents, an over preoccupation with written Portage records may undermine the parents' confidence to assist their child.

Although all of these concerns reflect the key themes within this thesis, it seems that, beyond drawing attention to these issues, there has been effectively no significant inquiry into the actual implications for both a shift in the understanding of professional practice related to Portage, or what processes that different form of expert practice might entail. However, a growing awareness of these concerns, at least within the United Kingdom and the United States, might account for the very recent reference within the Portage literature to issues of 'reflective practice'. For example, regarding more recent developments of understanding in relation to Portage implementation, Herwig (1998) reported that "The Portage Project has developed an *interactional model for change* that increases the use of family-centered practices with families" (no page numbers, emphasis added).

While this attention to expert practice issues seemed encouraging, Herwig's research regarding the training of Portage professionals ('interventionists') also claimed that:

"Comparisons of baseline data, from the Issues in Early Intervention Survey, to the second data point, approximately 15 months into the project, show that interventionists have modified how they think about early intervention issues, and as a result of this transformation in thought, are changing how they work with families" (no page number).

Consequently, even the recently introduced notion of reflective practice within Portage seemed to be understood as an instrumental means to effect change in the understanding of those workers supporting families, so that they were more in line with the Portage Project's 'core values', rather than an opportunity for greater creativity and 'artistry' in expert practice. Indeed, Herwig (1998) described how the results of the study into change "indicates that participants have internalized this belief since they agreed to participate in the mentoring demonstration" (no page number). This understanding of reflective practice does not seem to concur with my understanding of reflective practice, that I advocate within this thesis. I would argue that reflective practice, if critical, cannot be modelled in the way Herwig appeared to suggest, but rather such practice should entail the reflexive questioning of our scripted practice and of our core value certainties.

It is therefore the question of the relationship between reflection and reflexivity which seems to distinguish Herwig's understanding of reflective practice for Portage experts from my understanding and ideas for expert practice, suggested within this thesis.

#### **1.2.5. Reference To Issues Of Cultural Difference Within The Portage Literature**

The development of Portage within both the United States and the United Kingdom has occurred within broadly familiar material and cultural contexts specific to these countries. Regarding the wider cultural context of both countries, there are particular assumptions such as the 'normal' nature of family structures and expectations about parental responsibilities, together with other shared beliefs related to family life and children. For example, at a very elementary level, Portage assumes that parents will welcome help for their children, that they will be keen to allow strangers into their home and to share private information with them, and that they will be sufficiently motivated and able to carry out teaching tasks. Therefore, there must surely be many questions about how a Western designed, highly structured, behavioural teaching programme, which depends upon expert strangers visiting private homes, gaining knowledge about personal family issues and then informing and teaching adults how to teach their own children with special needs, might operate in very different cultures. However, in reviewing the Portage literature, it seems remarkable that, throughout the relatively rapid expansion of Portage internationally, there is very little research into issues of cultural difference and the implications of this, both for Portage and expert practice.

Particular difficulties might be expected to be encountered for the application of Portage, if the cultures into which it is to be implemented have very different patterns of social organisation and different cultural practices, including expectations and beliefs about family life, adult responsibilities, children's development, the cause and nature of special needs, and so forth. If, as Schön (1991) suggested, society in the West has grown accustomed to taking advice and support from 'professionals' on a whole range of matters, it should not be assumed that this is the case in other cultures. Although I shall return to consider more fully the cultural implications of Portage in Chapter V at this stage by way of introduction I have reviewed the research literature regarding Portage's operation and the effectiveness of delivering Portage to families who are from culturally more diverse backgrounds. The little research that I have been able to find that has directly considered cultural issues is associated with studies within the United Kingdom,



exploring Portage's application to multicultural communities and to a study by O'Toole in Guyana in which Portage was included.

Bardsley and Perkins (1985) looked at involving parents from Asian families, living in central Birmingham, with Portage. Referring to a previous study by Perkins and Powell (1983), they claimed that there are four key skills that parents need to possess in order to work specifically with Portage so that the programme was effective. Although, Bardsley and Perkins referred to these as skills, they seemed actually to be referring to the families' beliefs and knowledge and their cultural worldviews related to child development and disability. If these authors were correct, then it could be expected that the possession or not of these skills in families would have important implications for Portage's successful operation in other countries and cultures.

According to Bardsley and Perkins (1985), these skills included the following. Firstly, a belief in child development with an understanding that skills develop in an orderly sequence, which is approximately similar for most children. Secondly, a belief in 'teaching' as the means of improving and assisting a child's development and also an acceptance that parents could themselves effectively act as teachers. The authors also suggested that families should have a knowledge about the nature of disability, such as realising that children could have difficulties with learning as well as other skills, and that these difficulties could be alleviated or improved upon, but that the child may eventually still continue to experience some relative level of difficulty. Finally, they claimed that for Portage to be effective, families had to accept that changes in the environment, including their own behaviour, such as through their use of teaching and playing with the children, could lead to change and improvement in the child's difficulties.

When considering these questions with regard to the families within their study, Bardsley and Perkins (1985) found that most of the Asian families did indeed have an understanding of developmental milestones, with similar developmental norms related to children's motor skills, as did most of the indigenous English families also included within the study. However, the authors noted some differences between the Asian and indigenous English families regarding developmental norms associated to skills where a more significant learning component existed, such as the skills of dressing. The study

also noted, among the Asian families, a mixed belief in teaching as an effective means to ameliorating children's difficulties, with most of the Asian families believing that teaching could help a child to learn to walk, but with fewer families relating teaching to toilet training. The study also indicated that a significant number of Asian families did not fully understand the difficulties that their child's 'handicap' created, or the implication of the 'handicap'. Additionally, the authors commented upon the fact that few of the Asian families had toys available within their homes for teaching and they reported that most of the Asian families rarely played with their children in the Western sense of play.

Therefore overall, Bardsley and Perkins (1985) concluded that many of the Asian families did *not* have all of the prerequisite skills that had been assumed necessary for Portage to be effective. Yet the study found that, after one year in which the Asian families received the Portage service, the results of the study which compared the performance of Asian children with those from English families also receiving Portage, recorded very few quantitative differences. They consequently concluded that a Portage service could indeed be effectively delivered to Asian families. As the authors claimed, this clearly raises questions as to whether the cited 'prerequisite skills' are indeed crucial for the operation of Portage, as it seemed the Asian families could "carry out the essentials without them" (p. 111). However, another interpretation, not considered by the authors, was that, as a concept, 'culture' might be understood as far more dynamic and enactive than is usually portrayed in the traditional ethnographic literature. A more dynamic understanding of culture might, for example, explain the Asian families' ability to acquire, through their experiences of the Portage service, further adaptive 'skills' which would, as was the case, sufficiently allow them to participate successfully in the programme. I shall return to consider more widely a systemic perspective of culture which I have come to understand through my research in Chapter V.

The study conducted by Bardsley and Perkins (1985) additionally highlighted several important 'qualitative differences' in the Portage practice between the Asian families, as compared to the English families, which, according to the authors "require much more understanding of the advantages as well as the disadvantages of differing cultural attitudes" (p. 116) when offering Portage services to non-Western families. These qualitative differences related to various aspects of family life, material circumstances



and ideas of child-rearing. In conclusion, Bardsley and Perkins (1985, p. 115) concluded that:

“Portage as a package seems to be very much set in the culture of mid-west America, and in the package there is a model of a child with special child equipment and special child routines. In the Asian families visited there is a different model of routines. There is a different style of life that does not consist of the more routine/controlled/orderly style, implicit in the Portage materials. These differences need to be taken into account when activities are set so that they fit into the child’s and family’s life style”.

Syed and Smith (1988), also reflecting upon the implication of cultural differences in providing Portage to non-Western families within the United Kingdom, similarly drew attention to how “cultural differences make a functional difference to Portage work” (p. 46) and how Portage Workers have to “face up to the cognate as well as practical (behavioural) aspects of his or her procedures and the underlying conceptual or theoretical implications” (p. 47). However, again as with the Portage literature cited above, while the authors recognised the importance and complexities of cultural difference and cross-cultural collaboration, which required further training and guidelines for Portage workers, issues about the implications for expert practice and the manner of this practice were not considered.

O’Toole (1991), who drew similar conclusions to Bardsley and Perkins (1985), conducted an extensive examination of cultural issues related to Portage implemented outside of the United Kingdom. In a study of a group of mothers in Guyana, O’Toole looked at three supposedly prerequisite skills which were very similar to those identified by Bardsley and Perkins (1985), which were also assumed to be necessary for effective parental involvement. The ‘skills’ in O’Toole’s study also included: an understanding of the child and the sequential development of skills; a belief in the effectiveness of teaching; and opportunities for teaching within the home environment. O’Toole concluded that most mothers appeared to agree with the concept of ages and stages of child development; they also believed that they, as informal teachers, could teach a child early developmental skills; but that, given the burden of domestic tasks typically expected of mothers, “their ability to put aside specific periods of time to ‘teach’ the child would need to be considered carefully” (p. 28). In conclusion, O’Toole suggested that overall the philosophy underlying parental involvement was not alien to the context



of a developing country such as Guyana. Unfortunately, again these important questions of cultural difference and similarity seemed to be viewed in terms of the implications for Portage programmes, rather than in regard to any problems or indeed opportunities for expert practice development, such as related to the interactional complexities of working with others with different worldviews.

While research studies into the application of Portage in developing and non-Western countries, or with regard to its application to more diverse ethnic groups, have considered whether prerequisite ‘skills’ have or have not been present, few of these studies have directly considered the much wider implications of different cultural beliefs, as I shall discuss further within Chapter V. There has been little acknowledgement of how culture might influence the meaning and understanding of families regarding issues such as the relationships between children and adults, and how disability is generally understood within the particular cultural context. Moreover, most studies seem to have been concerned with culture in terms of how it could accommodate Portage, rather than how Portage itself could respond to and change in response to culture or, importantly, the implications for change of the practice of those experts who are implementing Portage. Significantly, few studies have considered or recognised Portage itself as a cultural phenomenon. Rather, as I have described, the Portage research literature has viewed prerequisites as ‘skills’, rather than as beliefs and values. Moreover, none of the research has focused upon the cultural practices of those Western experts who act as consultants in the implementation of Portage. Indeed, Sturmey and Crisp (1986) criticised Portage research generally for focusing ‘excessively’ on the training and role of Portage workers and parents, and the absence of any consideration of consultants’ skills, a central theme of this thesis.

### **1.3. Further Reflections Upon The Portage Literature And The Wider Relevance Of My Practice-Research**

It is difficult to account for the neglect of the interpersonal dimensions of expert practice in relation to Portage programmes, especially when applied within a cross-cultural context and, as my own experience shared with the reader within this thesis will illustrate, these aspects of interchange can hardly be ignored by the practitioner. Rather, perhaps it is easier to account for the predominance of the technical narrative within research reports. Such an explanation might embrace the following considerations.



Within psychological research, and psychologists have played a major role in both the development and promotion of Portage, and indeed to a slightly lesser extent within educational research, positivistic narratives have traditionally dominated. As I shall describe in Chapter II, it is only recently that new paradigm research approaches have been in the ascendancy and it is these approaches which have begun to challenge the underlying epistemology and ontology, and related methodology of positivistic research and the taken-for-granted authority of expert practice. It has been positivistic research, with its concern with discovering objective 'facts', that has largely pictured our understanding of the nature of the problems that the developing world is experiencing. The statistics of positivistic research, which frequently frame our initial understanding of childhood disability world-wide, typically obscure the complex methodological problems created by the conceptual issues of international surveys which collect these figures.

Yet, the wide range and variations in the figures regarding the prevalence of disability, whether among children or adults, demonstrates not only how such surveys are fraught with technical methodological difficulties, but also how these are highly variable and socially constructed concepts, associated with diverse and shifting culturally bound meanings (Peters, 1993). However, a consequence of the marshalling of disability statistics, in the form in which they are usually presented within the international development literature, has been to present the problem in value-free terms, as if disability was an unquestioned and unproblematic observable 'fact', to be readily counted and a self-evident, necessary and universal truth. As such, the problem appears to be frequently defined within the literature in an essentialist manner and, when set in such concrete terms, this representation overlooks the significance of different meanings attached to these terms by varying cultural perspectives. Unfortunately, in confusing fact with meaning, such statistics also provide a powerful rationalising discourse for a certain type of action, that is, technical action.

It is possible that the images these figures construct also establish a deficit model for understanding the problems of the developing world, in which there is assumed to be a shortage of what the West has, material resources and expertise to tackle disability and cater for special educational needs, which might be redressed by establishing similar



services to those available within the West, thereby solving such problems. Although a few authors have criticised such interpretations, arguing that the often quoted figures for disability both undervalue and fail to recognise the informal provision already provided in many developing countries (Miles, 1990), the pressure for technical intervention and change has remained.

Furthermore, I can also appreciate how viewing 'the problem' less objectively, and also questioning the authoritative position of the expert as the sole legitimate solver of problems, as I am arguing for within this thesis, both generates and calls for a high tolerance of uncertainty, together with an appreciation of the fussiness, shifting contradictions and indeterminacy of social contexts, all of which render the possibility of discovering clear-cut solutions far less likely. According to Kuhn (1996), although researchers are attracted by complicated and difficult problems, they also eschew those 'puzzles' which appear insoluble. Therefore, perhaps it is not solely that many experts, such as myself, have been trained and practice within a context in which the technical approach is seen as comfortably familiar and esteemed as most appropriate. It may also be that the potential threat to the position and the status of the expert, through embracing a postmodern epistemology and methodology of practice, has restricted the portrayal of cross-cultural disability issues, so that they are viewed largely as a technical problem requiring a technical solution. Additionally, this belief in 'observable fact' with which to understand the problem of disability internationally may have also been reciprocally reinforced by the traditional modernist understanding of the expert. That is, a belief in which 'rational' individual agency figures in the conception of the ideal professional and one who practices with technical-rationality as I shall also describe in Chapter II.

Indeed, the manner in which Portage has also traditionally been presented, with its highly scripted teaching techniques, with tangible and also measurable outcomes to assist programme evaluation and monitoring, no doubt has further encouraged it to be understood largely in technical terms. In many respects Portage appears as the archetypal modernist programme, with its roots embracing the behaviourist meta-narrative and offering technical fixes for technically minded experts. However, the relatively recent interest, within the Portage literature, in the role of the expert and the move to begin to question and re-think their practice (Herwig, 1998), has to be welcomed particularly if it is also extended to include not just family dynamics but also



the role of international experts working systemically and cross-culturally, and as a means to challenge and question the relevance of Portage's underlying assumptions. Furthermore, an interest in reflective practice may also prove helpful if, as is the case of this thesis, it further focuses attention onto the training and practice of 'behavioural consultants' (Sturmey and Crisp, 1986), an area of research that has remained neglected to date. The absence of such research within the international Portage literature is curious, in that much of the international expansion of Portage has taken place through professional training offered by consultants in the United States or in the United Kingdom, or alternatively has involved Portage consultants visiting the countries concerned, to advise and provide training workshops to local professionals. Likewise, as the majority of the literature regarding Portage and most other special educational programmes and educational initiatives generally designed for non-Western contexts are produced, as is this thesis, by Western experts, then research into the theory and practice of such experts is long overdue. I have also noted that even when the notion of partnership is raised within the literature, this too tends to only be in relation to Portage workers working with parents, and we hear very little about the importance of the relationship between Portage consultants and local professional colleagues.

Although Loftin (1988) did raise the issue of international Portage consultancy, and his report included a brief reference to his own practice as a consultant in South America, regarding how he tried to encourage local people to consider the Portage material as a starting point from which to adapt it to meet their own material and cultural needs, this was not expanded upon. Generally, therefore, while the Portage literature provides many descriptions of the complexities regarding programme adaptation to other cultures, there is little reference to the skills required to act as a consultant to other professionals, or how such experts might go about their practice, especially when those who are introducing Portage are from a different culture from the receiving group. Importantly, what seems to be overwhelmingly absent from the Portage literature is any reference to, or any sense of, generative dialogue between those experts advising upon and introducing the programme and their colleagues operating it or the families supported by it. In many of the reports, this does not even seem to be recognised as a relevant issue and, again, this may account for the absence of ideas about how experts might go about their practice, when this is identified as a concern. As I will describe in this thesis, working with others from different cultures can challenge the personal and professional



beliefs and values of experts, requiring them to constructively develop skills that they may not have acquired from their earlier experiences. From the Portage research literature that I have quoted above, it can be seen that, with the preoccupation upon technical questions, few consultants are likely to have sufficient experience to help them develop their new role or to negotiate the complex learning relationship between themselves and their colleagues. It is also possible that this failure to adequately consider these practice issues may account for the difficulties that such cross-cultural encounters have been known to create (e.g. Leach, 1991, 1993).

Also, where reference is made within the literature to the need to develop 'partnership with parents' as part of the Portage rhetoric, so as to 'empower' them, the complex issues and questions of how professionals might develop their practice towards this goal are usually absent, beyond rather vague suggestions and encouragement for experts to improve their listening skills. As I shall discuss more fully later within this thesis, such a simplistic view of the management of complex systemic personal interactions will not do. Rather, experts are likely to need to struggle with the question of how to re-theorise and redirect their practice to provide opportunities for others to genuinely contribute to the process of change.

Also absent from the Portage international literature are examples of reciprocal learning taking place, or of the multilateral exchange of ideas and understanding. Consequently, within the literature, change is usually viewed as unilateral and consisting of local colleagues learning the rudiments, conceptual and practical, of the new Portage programme. Change is therefore effectively portrayed as either change in the ways that families teach their children, so as to assist the development of their children, or change in the children regarding the skills they have learned. Change is rarely considered in terms of how Portage is understood and never in terms of how the expert considers their own practice and the learning they may have derived from working with others. In contrast, within this thesis, I will argue and also demonstrate that the cross-cultural context provides opportunities to transform and to expand the very conceptual structures through which expert understanding occurs. I believe that these contexts can allow for the generation of new intelligibilities and conceptual resources, for both the experts and for all those involved in the process, if an openness to interchange is acknowledged.



Indeed, others have also taken a wider and more positive view of the potential role of non-Western and traditional cultural practices, and have suggested how alternative cultural perspectives, values and knowledge might serve to enrich our own Western understanding, such as in the fields of ethnoscience, ethnomedicine, special education and rehabilitation practices (Marquet 1972; Peters, 1993; Nicholls, 1996). Mallory (1996, p. 97), reflecting upon the current American special needs position, asserted that:

“The conscious desire to discover indigenous solutions, congruent with regional needs and value is a healthy one. If it holds, and becomes widespread in other developing and non-Western nations, the consequences for American practice must be examined. To put it bluntly, we will have to suppress the tendency to lecture and cultivate the habit of listening in the emerging global community”.

Valuable lessons may therefore be learned from further research which openly encourages interchange, which could potentially assist child and disability support programmes also within the West, especially as changing economic circumstances and increasingly culturally heterogeneous client groups demand more diverse, culturally sensitive and financially sustainable approaches (Harry, et al., 1992). Therefore, research which assists in further sensitising the educational establishment and experts to the cultural dimensions of education, and to appreciating the value of interchange, may potentially help to shift the tendency to view cultural beliefs as something that only others have and as something which can present as a barrier to education (Devlieger, 1995).

This introduces a further area that has been overlooked within the Portage literature generally, regarding the question as to how Portage forms part of the wider international development discourse. The Portage literature has largely ignored how Portage, as a feature of international development, operates in an arena which includes cultural contestation and identity construction, and how the Portage programme itself creates a ‘regime of representation’ (Escobar, 1992a, 1995). As with questions related to socio-cultural and interpersonal interaction, much of the research on the adoption and adaptation of Portage internationally has not adequately considered questions such as those of the imbalance in power-structures, which characterise the relationship between those advocating Portage and members of the ‘recipient’ population. When experts are reluctant to consider power structures and their implications on those involved with the development of programmes, this may potentially leave these innovations open to



charges of neo-colonialism. However, I believe that a change in focus towards the importance of the social interactional and the processes of reciprocal exchange can highlight such concerns, as well as potentially providing forms of practice which constructively address power issues.

Of course viewing the problems of the developing world in technical terms, which primarily require an expert technical-rationality, is not restricted solely to the Portage literature, but also includes other educational approaches and research related to disability or special need issues within developing countries, as well as educational research and international development in general. Consequently, while this thesis is primarily concerned with Portage and the practice of experts who assist in the implementation of Portage in non-Western countries, it also has much wider relevance. Frequently, the literature regarding international development initiatives, both in relation to wider educational and also non-educational concerns, seems to assume that the solution to problems primarily includes the widespread adoption of rational systems of management and development, usually based upon Western conceptualisations, ethical practices and policies, together with Western technological knowledge. Again, as I will suggest later in this thesis, this tendency to emphasise the technical, to the neglect of the cultural and social interactional, may also reflect the Western modernist notion of expertise and knowledge. Indeed, regarding international development generally, Manzo (1991) called for a thorough analysis of the shortcomings of Western dominated, modernist approaches to international development, and for a search for more locally meaningful 'counter-modernist' practices that are grounded in the specific needs of the local cultural context.

Miles (1996) also expressed concern with what he termed a 'Western sociological imperialism'. Similarly, Schwendler (1984, p. 4) earlier had also questioned aspects of the international drive for development, and expressed concern with the possibly negative effects of the transfer of knowledge to some non-Western countries, suggesting that:

“under the pretext of giving disadvantaged groups, regions or countries the means of development.....we introduce them to ways of life, techniques and economic imperatives which alter, maim, or destroy their traditions and upset their systems, creating a new state of dependence and preventing them from making their own distinctive contribution to the international community”.



While not wholly agreeing with the implied passive, recipient role with which Schwendler pictured people within developing countries, he also raised the pertinent issue of how Western professionals may, in their haste to import and share their own understandings and knowledge, fail to value non-Western perspectives, practices and knowledge. Furthermore, driven by modernist technical concerns, Western development agencies often work to their own time-scales, financial deadlines and target dates for achieving their own objectives, possibly at the expense of adequate investment into understanding significant cultural contextual and inter-relational factors. As Cassidy (1987, p. 312) noted “Structural rewards currently accrue to those who get definable results rapidly and within budget”. It may therefore also be that the bureaucratic demands of the international development business itself has encouraged the collection of actuarial data, which might be more susceptible to policy manipulation, etc. and so legitimised solutions to be understood in instrumental and technical terms.

Indeed, despite the last two decades witnessing a steady growth in the establishment of services for children with disabilities and special needs in developing countries, the significance and effects of the local cultural context appears to have been given only rather token consideration (Kalyanpur, 1996; Miles, 1996). Many, often well intentioned, drives towards establishing services for children in developing countries appear to have overlooked the need for more explicitly culturally sensitive perspectives regarding a whole range of concepts, particularly those relating to the different cultural meanings given to childhood issues and disability. Where studies and programmes have recognised the need to make programmes culturally more sensitive, the emphasis, as with Portage generally, often continues to remain primarily focused upon technical issues of programme development, such as modifying Western programmes to ‘fit’ the local culture, through adapting curriculum content or adjusting the practical manner of service delivery (e.g. Baine, 1988; Sturmey, et al., 1992; O’Toole and McConkey, 1995). Alternatively, Western experts have looked towards building upon or guiding aspects of the local culture so that they are more in line with Western ideas (e.g. UNICEF, 1993) rather than also recognising the significant social interactional issues and processes within cross-cultural relationships.

Moreover, even within the United Kingdom and United States, societies are becoming increasingly diverse and multicultural, and the questioning of the assumptions of expert practice related to individual, family and community programmes and the processes of that practice are, I believe, therefore equally valid. Again, from my own practice experience as an educational psychologist within the West, I regularly encounter educational initiatives which seem to be aimed at questions of how we, as middle class educated experts, can design ways which help to change the behaviour and thinking of others, usually those from less advantaged families or groups within society, so that they might begin to think and behaviour more like us, such as in terms of their parental behaviour or with regard to their attitudes towards formal education, and so on. Rarely is the problem understood in terms of how we might first engage with others, those who might think differently about these issues, so that we can perhaps begin to generate new ways for all of understanding these topics.

I recognise that challenging this predominantly instrumental rationality of Western expert practice is difficult. However, I believe that to do so entails both recognising and valuing the idea that our expert practice must first be concerned with the relational before the technical, and then it necessitates considering the means by which we should go about this different form of practice, so as to ensure that the voices of others are also heard and included. Regarding my own professional development, these concerns have led me to first recognise and then question my underlying ontology, epistemology and methodology of expert practice. This, in turn, recursively helped me to also reframe my understanding of research, so as to recognise the contiguity with the methodology of my practice, as I will now discuss within Chapter II.



## **Chapter II**

### **Conceptually Positioning This Thesis: Epistemological, Ontological And Methodological Research Concerns**

#### **2.1. Introduction**

Within Chapter I, I informed the reader about why this research was undertaken, together with describing the key aims of the thesis, its scope, and how I believe it primarily relates to wider issues and knowledge concerning expert practice associated with Portage. To that extent I have begun to address part of Clarke et al.'s (1993) recommendations regarding action research, a methodology by which, as I will claim below, I believe that this thesis can be broadly considered. Clarke et al. (1993, p. 491) said of action research reports that:

“a) the aims [of the report] will have to be made explicit, if only in retrospect;” and, “b) (most importantly) that the action researcher has an obligation to articulate the criteria upon which their own work is to be judged; i.e. to inform the reader about how to read (or view) it”.

It is to the second of Clarke et al.'s recommendations that I now turn and, in so doing, to consequently inform the reader of how I understand my own action-research to be conceptually located. Indeed, I also hope to achieve more than simply provide the reader with an explanation of how this thesis, as an educational research endeavour, might be viewed, in that I believe this chapter stands to demonstrate a further aspect of my continuing professional development and learning, that of my awakening as a reflective practitioner-researcher.

#### **2.2. An Overview Of Contemporary Challenges To Research**

I have found attempting to position this thesis very challenging, in that writing any educational research currently has been rendered problematic by the apparent contemporary crises of representation and legitimisation (Denzin and Lincoln, 1998). These crises have largely been brought about by the advent of what is termed postmodernism and the epistemological, ontological and methodological questions it raises in regard to research and to how expert practice, particularly in education, is increasingly being understood. Indeed, it would be difficult to imagine how anyone presently engaged in educational research would not find that their work was

overshadowed by these crises; crises which appear to defy resolution (Lather, 1990, 1991; McWilliam, 1993).

While it is not the primary focus of this thesis to directly offer a means of resolving these problems and challenges to research and practice raised by postmodernism issues, they clearly have a bearing upon how I have come to understand and frame both my own research endeavour and expert practice development. I have therefore thought it very appropriate to trace and describe some of the current concerns and arguments regarding contemporary educational research and practice. Additionally, I believe this will also further assist the reader in understanding the issues of systemic practice and social constructionism that I describe and discuss in regard to my expert practice later in this thesis.

To understand the nature of the challenges to contemporary educational research and also expert practice, it is necessary to first consider key issues which determine the character of research and practice paradigms. These issues are related to, “three fundamental questions, which are interconnected in such a way that the answer given to any one question, taken in any order, constrains how the others are answered” (Guba and Lincoln, 1998, p. 201). These questions concern ontology, epistemology and methodology. I am aware that to some of the readers of this thesis these questions will be very familiar. However, they are questions which I personally have only begun to encounter since reflecting upon my expert experiences in Africa and deciding to undertake the writing of this thesis, so that this chapter represents the most recent stage of my understanding.

As it may be helpful to the reader, I believe it is appropriate to briefly explain my understanding of each of these terms. Drawing upon Guba and Lincoln (1998), to summarise, I understand ontology to be about the nature of being and the form of reality. That is, for example, whether or not a ‘real’ enduring, fixed and objective world exists, one which is constant and, if so, what can be known about that world. Or alternatively, whether the world is indeterminate, disorderly and constantly in flux and thereby ultimately and objectively ‘unknowable’. Ontological questions therefore raise queries regarding knowledge.



Epistemology refers to the explanatory principles that underpin particular bodies of knowledge. The Concise Oxford Dictionary refers to epistemology as the, “theory of the method or grounds of knowledge”. Epistemology is therefore about both knowledge and the nature of the relationship between the knower (e.g. the researcher) and what can be known, that is, the knowledge about ‘how we know what we know’. This relationship importantly depends upon the knower’s view of ontology “since claims about what exists in the world imply claims about how what exists can be known” (Usher et al. 1997, p. 173). If, for example, there is assumed to be a ‘real’, objective, knowable world, then the knower’s ontological position must be one of objective detachment so as to discover and collect objective knowledge of the ‘real’ nature of things in the world, unsullied as far as possible by their own subjectivity.

Methodological questions are about how the knower/researcher goes, “about finding out whatever he or she believes can be known” (Guba and Lincoln, 1998, p. 201). Methodological questions in turn are therefore predicated upon the researcher’s epistemological and ontological stance. That is, if for example, it is assumed that a ‘real’ world exists which can be objectively known through gathering objective knowledge, then the related methodology will strictly prescribe only certain specific methods (of research), those which ensure objectivity, as appropriate.

Within contemporary social and educational research literature, it seems to be increasingly recognised that methodological questions, from a postmodern perspective at least, can no longer be divorced from questions of epistemology and ontology, as has traditionally been the case with regard to the traditional understanding of research (Usher et al., 1997). Usher et al. (1997) also asserted that all research, whether natural or social, modern or postmodern makes knowledge claims. That is, it is based upon an epistemology but that often this is taken for granted and not made explicit within research reports. Consequently, Usher et al. (1997) suggested that each research approach could therefore be said to be the expression of both a commitment to a particular view of reality, an ontology, and to ways of knowing that world, an epistemology, held by the researcher.



### **2.3. Potential Conceptual Frameworks: Modern And Postmodern Paradigms**

The two conceptual frameworks or inquiry paradigms, modernism and postmodernism, which I introduce below, have relevance both to the current debate within research and to the shifts in my own understanding regarding expert practice. I am using the term ‘paradigm’ in a broader sense than Kuhn (1996, p.10) who understood paradigms to be sets of “accepted examples of actual scientific practice”, or models of research practice, frequently taken-for-granted by the community of researchers which accepted them. However, for the purposes of description, I am using the term as a convenient concept to encompass broader sets of distinctive beliefs and assumptions about ontological, epistemological and methodological questions that also inform different courses of inquiry and practice.

Before I describe my present understanding of modernism and postmodernism, I should acknowledge my awareness that portraying modernism and postmodernism in the textual manner, under separate headings, does tend to imply a modernism-postmodernism dualism, as if this is a comparison between two disembodied distinct theories. However, as I hope the reader will appreciate in reading this chapter further, my own emerging understanding suggests that these might more appropriately be viewed rather as different forms of self-understanding that contemporary experts and researchers tend to adopt and which lead to distinctive views about the nature of reality, knowing and the form that research and practice should take.

#### **2.3.1. Modernism And Positivism**

Gergen and Thatchenkery (1997) argued that the Western world had, for the most part of the 20<sup>th</sup> Century, been dominated by a cluster of ideas that retrospectively have been labelled modernist. They claimed that modernism and its associated ideas, values and ways of knowing have represented the foundation of institutional life and various cultural practices and that it continues to represent the predominant social and cultural development of the West.

Typically, modernism is believed to be embodied in the ‘Age of Enlightenment’ of the 18<sup>th</sup> Century (Foucault 1970; Sarup, 1988). Foucault (1970) claimed that at that time society turned the apparatus of knowledge upon itself in a distancing, self-objectifying fashion, which led to the construction of forms of inquiry and rationality that characterise



modern science. With the advent of modernism, scientific experimentation guided by reason began to enter the popular conscience as the valid framework in which to structure judgements and on which to base values and to a large extent, particularly within the West, remains so to date.

The emerging modern paradigm was characterised by a concern with the underlying structures of the individual and society, which supporters of modernism came to believe could be objectively known and which patterned the surface manifestations of phenomena and events in both society and the individual. The key unifying threads of modernity, stemming from its rejection of the values of the pre-modern period, are both that reason became esteemed as the rationale by which we might measure ourselves and by a belief in the idea of progress which could be attained by a break from both history and tradition, so as to bring liberation to people from ignorance and superstition. The assumptions of a modernist view of reality and knowledge are that knowledge can be grounded in absolute truth and that epistemologically what can be known is outside of and independent of the knower, that is, it is 'objective'. Modernism presumes that by careful systematic and 'objective' observation it is possible to discover the manner in which events and phenomena are ordered and lawfully related to each other and thereby to construct theory which might be employed to explain, predict and to control.

According to modernist belief, phenomena could only be accurately represented, that is validated, if appropriate scientific or empirical methodological procedures were followed and if the evidence was thereafter available for inter-subjective, disinterested observation and confirmation (Richardson, 1990a; Ward, 1996). Generally referred to as positivism or empiricism, this aspect of the modern philosophical system recognised only positive facts and observable phenomena, rejecting metaphysics and theism. Positivism is traditionally associated with the natural sciences, which to a large extent still continue to view the influence of the researcher upon the research process as negative and something to be minimised and controlled. The scientific protocol, the scientific method, was therefore developed to ensure that the influence of the researcher on the data was reduced as far as possible and that results could be replicated and thus validated by other researchers. Consequently, the standardisation of the procedures of observation became viewed as crucial so that observations should be as stable as possible across different observers.



Given the influential modernist paradigm, the other key themes for modernist progress have been technologisation, institutionalisation, bureaucratisation and professionalism. These characteristics have also all served to convey and emphasise the modernist belief that the most legitimate search for truth could only be undertaken as a specialised activity and one which was, to a large extent, exclusively reserved for those suitably qualified and officially approved as having the necessary professional expertise. That is, modernism implied and indeed continues to suggest that only certain people, experts, by virtue of their ability to accumulate specialised and objective knowledge about the world, are in a position to know more than others about the world. By the supposed ability of experts to see beyond mere surface appearances into the underlying structures and causes of events and phenomena, they are also assumed to be best positioned to use their knowledge to address problems when these occur.

Regarding research, the influence of positivism has extended beyond the natural sciences, and positivism has been embraced by qualitative social researchers within sociology, psychology and the science of education and has played a key role in influencing the development of many of the social sciences, particularly between the 1930s and 1970s. As with the natural world, positivism assumed that the social world ontologically was equally subject to order and lawfully structured. Consequently, the view of a lawful social world suggested to positivistic social researchers that cause and effect might become apparent to the objective researcher and so allow the generation of universal laws about human behaviour and social organisation (Carr and Kemmis, 1986; Finch, 1986).

However, positivistic approaches have been generally less successful in the field of social science than in the natural sciences (Carr, 1997). Positivist research has been largely unable to achieve the modernist aspiration of providing a means of controlling individual behaviour or of predicting behaviour, despite multiple theories attempting to do so. Often such theoretical knowledge appears to have limited relevance to the exacting demands of everyday professional life, such as in Health Care (Meyer, 1997) and Education (Carr, 1997; Siraj-Blatchford and Siraj-Blatchford, 1997). Positivist methodologies have particular difficulty accommodating dynamic social processes, that is processes which are not mechanistic but which shift and change and which are



constantly being redefined, such as by the symbolic systems of thought and language through which individuals construct their world. Within social and educational research the ontological assumptions of positivism have therefore not been largely realised. Indeed, increasingly authors are concluding that the social world appears to be both too complex to be accounted for by positivism and that it is ontologically, effectively indeterminate (Maturana, 1988; Capra, 1997).

Indeed, given the apparent problems of applying positivism within social and educational research, the applicability of the scientific method began to be challenged increasingly during the early 20<sup>th</sup> Century (Steedman, 1991). The subsequent post-positivist (Denzin and Lincoln, 1998), interactionist methodology, that later evolved in response to the recognition of the complexity of human behaviour was claimed by its proponents to deliver a greater ecological validity to research findings than that which might be obtained by laboratory or more orthodox quantitative and qualitative approaches. Symbolic interactionism, for example, espoused the use of research methodologies which observed and recorded interactions, through which the researchers actively immersed themselves into the social flux they wished to research. By this method it was believed the researcher would be able to uncover and describe the meaning behind the observed subject's behaviour. This method became generally known as 'participant observation' and as a research strategy it formed the prime method for research investigation of the interactionist approach.

Interactionists have traditionally countered accusations of subjectivity, and criticisms of the quality and nature of their data collected through the participant observation method, by openly acknowledging the difficulty of both the replication and also the generalisation of their observations. Such research eschews the formulation of universal laws and thereby a concern with predication, and instead it attempts to expose not what will happen in a similar context, but what could occur. However, I have noted from my own research into research methodologies that even a brief perusal of interpretative and post-positive research texts reveals a pervasive sensitivity to criticisms of the rigour and objectivity of such research (Hammersley and Atkinson, 1983; Silverman, 1985; Cohen and Manion, 1994; Denzin and Lincoln, 1994; Bradley, 1995). As a consequence it appears that post-positivist methodological research texts frequently encourage researchers to adopt a variety of methods that purport to ensure a greater validity of



observations and methods. These include the taking of copious field-notes, the keeping of detailed diaries, triangulation, etc., which are all suggested as possible means to ensure the validity and representative nature of research observations.

It seems therefore that such interpretative research advice which is designed to instil greater rigour in the research maintains the presumption that, “with proper caution scientists can safely avoid disfiguring the picture of nature with their own fingerprints” (Gergen and Gergen, 1991, p. 76). As such, post-positive interpretative approaches largely appear to remain locked into a belief that ‘truth’ is to be found in the procedural, that is through sanctioned research method and technique. These techniques all aspire to demonstrate how the social researcher has successfully captured a ‘piece of objective reality’ during their study. Furthermore, it has also been suggested that many of the recommended interpretative methods are perhaps more concerned with the desire to ensure acceptability and respectability within the researcher’s own academic circles (Reed and Proctor, 1995). Stringer (1996) also claimed that interpretative, post-positivist methodologies were typically guided by the interest of conducting research for its own sake and that consequently such approaches frequently fell short of generating findings which were relevant to improving practice or of providing useful advice. Stringer (1996) further believed that the interpretative methodology and methods remained limited in any relevance to understanding the social world and supporting practice as they fail to provide any link between theory and practice.

Nonetheless, the hegemony of modernism remains very influential, and positivistic and post-positivistic research methodologies have, until relatively recently, reigned in effect unchallenged as the conceptual frameworks by which research has been understood and has been produced, and this has consequently severely marginalised or precluded other ways of seeing and doing research.

However, the last two decades in particular have witnessed a steady and prolonged criticism and disillusionment with the pervasive paradigmatic and epistemological basis of the positivistic tradition and modernism on social and educational research (Susman and Evered, 1978; Hammersley and Atkinson, 1983). It has been this dissatisfaction with the modernist programme, the positivists’ methodology and the reluctance or inability of post-positivist methodologies to fully throw off their positivist anxieties,



together with the wider disillusionment with the path of 'progress' in general, and its subjugation of the 'other' and alternative worldviews, which some writers claim eventually led to the emergence of postmodernity (Polkinghorne, 1992).

### **2.3.2. Postmodernism**

Certainly within the last decade, the aesthetic and intellectual conceptual movement known as postmodernism seems to have taken root in almost every academic discipline and has transformed academic debate and the very way we think about thinking. However, within the literature that I have encountered concerning postmodernism, there appears to be many interpretations concerning the genesis of postmodern thought and various disparate views over its history (Jameson, 1984; Sarup, 1988).

In general, the advent of what is now termed postmodernism has historically been located in the aftermath of World War II, where the decades of wars, death camps and nuclear devastation throughout the first half of the 20<sup>th</sup> Century, cumulatively led to a questioning of the fundamental liberating capacity of the modernist movement (Harvey, 1989; Manning, 1995). In this sense, postmodernism has been described as a consequence of the failures of the modernist project and an erosion of faith in modernism's ability to deliver its promise to liberate humanity from poverty, sickness, crime, and so forth (Polkinghorne, 1992).

As I have stated, it is not my aim, nor indeed is there scope in this thesis, to survey all of the arguments and debate concerning postmodernism or to even attempt to provide any definitive description of postmodernism. Indeed, despite postmodernity's ubiquitous presence in the literature of most social science disciplines, it appears to generally defy attempts at accurate definition and uses of the term are contested. Nevertheless, from my reading of the literature on postmodernism, most texts suggest that it refers to a movement in Western culture away from a belief in, and an epistemological search for, fundamental truths about reality, together with a growing ontological appreciation of the complexity of the world (Smith, 1989). Most texts imply that while postmodernism does not reject an external reality, or science and technology, that it is concerned with exploring how language, power, social factors and history shape our views about reality, truth and knowledge (Hollinger, 1994). Gergen (1999, p. 195, original emphasis)



proposed that, given the multiple definitions of postmodernism, it might be best understood as:

“pointing to a range of inter-related dialogues on our current position.....a giddy sense of spiralling and chaotic change...a pervasive sense of erosion in a firm sense of self...the falling away of traditional values, and the loss of confidence in the *grand narratives* of the past”.

Much of the literature related to postmodernism also implies that it might be best ‘framed’, as opposed to defined and thereby ‘closed’, by contrasting it with the modernist movement (Manning, 1995; Ward, 1996; Richardson, 1998a).

As it is usually positioned in the literature, postmodern thought is understood to challenge the epistemological, ontological and methodological foundations of modernity that I have described above. Likewise, Shotter (1993a, p. 66), quoting Bhaskar, argued that the theory of ideas and understanding related to social constructionism (upon which postmodernism has a significant bearing) reveals modernism’s “ ‘epistemic fallacy’ - the definition of being in terms of our knowledge of it”, in that modernism assumes that we can reveal the true nature of the world by constructing better theories and knowledge about it. Kuhn (1996, p. 5) also criticised that paradigm based or, “Normal science...is predicated on the assumption that the scientific community knows what the world is like”. According to Shotter (1993a) postmodern thinking conversely leads to a recognition that we now need to shift how we view the world and reality and as such postmodernism privileges ontology over epistemology. Shotter claimed that the real world is not knowable and that any orderliness in its quality is likely to be a reflection of our own socially constructed and individual cognition, which imposes meaning upon the world and that this needs to be recognised as such.

According to Shotter (1993a), this shift in thinking to postmodernism entails a reconsideration of language, so that it is understood not as a means to mirror the real world, but as a means by which we come to know and understand the real world. That is, postmodernism argues that, while we are subject to the limitations and boundaries of the physical world which has direct bearing upon our lives, we cannot ‘know’ that world in any ‘real’ sense. This is because in the moment of our sensing we are simultaneously also knowing and that knowing consists of bringing our pre-understandings to bear upon



our senses so that all knowing and knowledge “retains the taint of our humanness” (Polkinghorne 1992, p. 149). Therefore, we are inevitably unable to escape the boundaries of our socially constructed understandings in order to achieve any objective validation of our ‘real’ experiences.

In my readings of postmodernism I have identified two key areas with which it both appears to most significantly challenge modern ideas and which have implications for how I have come to conceptually understand issues related to my research and my expert practice: these are language and knowledge.

### *Postmodernism And Language*

Within the literature which refers to postmodernism, its philosophical roots are frequently cited as being traced to a number of writers and philosophers. Although not themselves necessarily described as postmodern, these writers seem to figure most prominently. In short, all of these writers imply that the manner in which we speak and write is determined by the patterns of power within our cultures and societies and the effects of language. Like Shotter (1993a), these writers see language not as neutral or representational of some separate reality, but rather they view it as productive and constitutive of meaning and as shaping the boundaries of our intelligibility at a particular time within our culture. Meaning, derived through language, is understood as never fixed but multiple, historically contingent and an effect of power.

Foucault (1977) for example dismissed the modernist ideology of historical progress as a non-evolutionary, random and fragmented field of disconnected discourses and an illusion. Discourses, according to Foucault (1977), were linguistic practices that create a space in which only certain things could be said or imagined. Foucault argued that it is through the creation of particular discourses that social reality comes into being and results in the systematic creation of concepts, theories and practices. For Foucault the only evidence of ‘progress’ within the era of modernity could be linked to the development of more sophisticated and refined techniques of domination. He argued that attempts to organise society to embrace modernist beliefs, such as to esteem scientific knowledge, reason and rationality, reflected an exercise in power. Knowledge, Foucault (1980) claimed, was therefore as equally related to politics as it was to understanding.



Relevant to my own search for a methodology in which to frame my practitioner experiences and personal knowledge gained from those experiences, and to my concerns for establishing the validity of my research, Foucault also suggested that the practices of knowledge creation, i.e. research, might be understood more than simply as an exploration of method, but also as an inquiry into the means by which knowledge is produced and the distribution of benefits to those who control knowledge production. Foucault (Rabinow, 1984, p. xiii) claimed that in order to break free of the ‘fascism of our minds’, imposed by the prevailing meta-narratives (paradigms) of society we must, “develop action, thought and desires by proliferation, juxtaposition, and disjunction,” and to “prefer what is positive and multiple, difference over uniformity, flows over unities, mobile arrangements over systems. Because what is productive is not sedentary but nomadic” .

Indeed, Foucault appeared to also be arguing for an acceptance of a dialectical view of knowledge, a tolerance of uncertainty or acceptance of provisional and temporary certainties, rather than the dominance of the propositional. This association of postmodernity with dynamic change and fluidity, compared to more modern ideas of established methods of rigour and validity, probably contributes to the sometimes polemic arguments regarding notions of research and validity occurring currently. Indeed, Foucault (Rabinow, 1984) also seemed to be arguing for what Lather (1994) called a ‘validity of transgression’, as I shall discuss below in relation to the crisis of legitimisation (Denzin and Lincoln, 1998) in which creative social research must constantly and critically question and push the boundaries of what is currently viewed as the basis for validity judgements.

This postmodern theme of challenging the ‘given’ or the taken-for-granted, and the pursuit of constant change and challenge, is usually referred to in postmodern texts as ‘deconstruction’, a term sometimes used synonymously with the postmodern perspective and is most often associated with the work of the French philosopher Jacques Derrida.

In line with others, Derrida also argued that meaning and understanding are not naturally intrinsic to the world but rather they are socially constructed. Consequently, deconstruction, according to Derrida, represented a means to reverse the process of



construction and thereby to show how precisely artificial are the ordinary, taken-for-granted structures of the social world. According to Lather (1991, p. 156) deconstruction also, “foregrounds the lack of innocence in any discourse by looking for the textual staging of knowledge, the constitutive effects of our uses of language” and provides, “a safeguard against dogmatism”.

Derrida also attempted to demonstrate that modern rationality and rationalisation are processes that are concerned with normalisation and standardisation and so seek to disguise the contradictions and paradoxes at the core of human existence and that deconstruction if it can be anything is “an openness towards the other” (1984, p. 124) a recognition and tolerance of difference. Derrida (1984) also identified problems in prevalent Western thinking in that he claimed modernist ideology failed to consider problematic that our modes of understanding the world and of creating knowledge depended upon language. Derrida saw language as much more unstable and unsettled than it is usually considered by modern thinkers and he argued that the basic elements of a language are impossible to clearly define since they were in continuous movement and transformation. For Derrida (1984), language was therefore incapable of reflecting reality since it was historically and culturally constituted and ever changing. From this perspective, meaning and understanding are viewed as always culturally and linguistically mediated so that there is nothing above and beyond language that we can look towards to guarantee meaning. Meaning therefore can not be guaranteed by anything outside of itself.

Understanding the role of language is clearly a central theme to the postmodern epistemology that sees the significance of language as all encompassing and unavoidable. From my reading, it seems that postmodernism as a conceptual framework suggests that language represents a constitutive force which not only reflects and varies with the various shifting views of reality that may be created, but that it has the power to organise our thoughts and experiences. Language is seen as a conveyor and a creator of worldviews and epistemological frames. As I shall continue to describe in the next section, all forms of knowledge are therefore seen as linked to the language and discourses which are influential and prevalent within a culture at a particularly historical time and which shape social practices.



I have found especially useful, in understanding my own experiences and expert practice, the debate concerning how postmodernism conceptually focuses upon and encourages a questioning of the regulatory discourses which frame our understanding of reality and knowing and which structure our lives. It has helped me to understand how the ways in which we talk and write and arrive at meaning are embedded in the historically contingent, ideologically specific, social practices of our cultures. As Weedon (1987, p. 33, quoted in Usher et al., 1997, p. 103) claimed:

“we learn to give voice - meaning - to our experience and to understand it, according to particular ways of thinking, particular discourses which pre-date our entry into language. These ways of thinking constitute our consciousness, and the positions with which we identify and structure our sense of ourselves, our subjectivity”.

### Postmodernity And Knowledge

I have referred to the epistemological battle over what constitutes legitimate knowledge, which the modern-postmodern debate has raised and which currently continues to receive attention within the social and educational sciences and indeed recently even within the natural sciences. These questions centre upon the form and nature of knowledge, the methods by which knowledge is both acquired and by which it is communicated to others. The modernist view appears to portray knowledge rather like a commodity in which knowledge is seen as something of which people can have more or less. McNiff (1993) also described this positivistic notion of knowledge as propositional knowledge, in that knowledge is understood as a collection of theories and statements, usually in propositional, “If....then...” form. Seen as such, knowledge is effectively reduced to data, data that exists independently of the researcher and which is personally and socially inert. This modern and positivistic understanding of knowledge has not gone unchallenged. Others have viewed knowledge differently, suggesting that it should be perceived as fundamentally subjective, ill-defined, softer, and as created from the unique processes of personal experience and insight (Scott, 1996).

Polanyi (1960) also proposed a broader understanding of knowledge to include what he termed ‘tacit knowledge’, a concept which he described as that which we know but cannot always tell or express clearly. He argued that this tacit knowledge was frequently both the source of formal scientific creativity and that it effectively acted as a tool that we all utilise to tackle our everyday challenges. However, Polanyi cautioned that in



modern Western societies this tacit knowledge is generally overshadowed by ‘explicit’ knowledge, that is knowledge derived through formal education, which esteemed a scientific technological rationality. Nevertheless, Polanyi claimed that tacit knowledge represented the dominant principle for all knowledge, such that to dismiss the importance of it would effectively involve a rejection of any kind of knowledge whatsoever. Polanyi therefore understood tacit knowledge as fundamental and crucial to all forms of knowledge, no matter how exact or precise or however much it used formal procedures such as the scientific method.

Polanyi’s views, amongst others, helped establish the conceptual foundations and the acceptance and legitimisation by some of what later has been variously labelled experientially or practitioner derived knowledge and the epistemology of practice (e.g. Schön, 1991). Similarly, in reference to the development of psychology with which my own professional background has been associated, Polkinghorne (1992) referred to the schism between the epistemological stances of academic psychology and that of the ‘psychology of practice’. Polkinghorne (1992) argued that, while academic psychology has shared the epistemological foundations of modernism, the body of knowledge that the psychology of practice has drawn upon has consisted of a, “fragmented collection of discordant theories and techniques” (p. 146) and that it was, “the actual interactions between practitioners and clients that provided the data on which the knowledge of practice was built” (p. 146). Polkinghorne asserted that, as such, the practitioner knowledge base of practical psychology essentially concurred with more recent postmodern themes regarding knowledge.

Increasingly therefore, with the rise of postmodern thought, it seems that more personalised and localised notions of knowledge, and the methods by which knowledge might be acquired, that is research, have gained ground. Postmodernism’s questioning of an orderly, lawful universe and the undermining of totalising, single and unifying belief systems has turned postmodernism’s attention and that of associated research to difference, diversity and uniqueness. In a fragmented, chaotic universe (Capra, 1997) with multiple and indeterminate events, knowledge of the local and the specific becomes of interest, along with an acknowledgement that no one interpretative paradigm, including logical empiricism, will suffice. So postmodern approaches to knowledge, including research interests, point to a consideration and potential acceptance of diverse



means by which to understand the world. Consequently, postmodernism appears content to tolerate diverse, even contradictory, epistemologies.

A further key conceptual distinction between modernity and postmodernity concerns how these two conceptual frameworks view the purpose of knowledge. Within the literature, I have detected that some postmodern understandings of knowledge, while accepting knowledge as diverse and multiple, tend to view knowledge and particularly expert practice knowledge as performative (Schön, 1991). That is, knowledge is framed as concerned primarily with actions rather than propositions, in which the action is uniquely related to the demands of the context in which it is to be applied, so that knowledge is also understood as contextual. As I understand, this contextual and performative understanding of knowledge views knowledge as a shifting, dynamic, dialectic phenomena, so that knowledge is open to perpetual challenge and necessitating continued reformation and development. There is no assumption that at sometime in the future we will have arrived at some ideal state in which the questions of knowledge are all, or even partially settled. Such views may reflect an acknowledgement that, despite the best efforts of conventional science, we are apparently not converging upon a universal theory of existence. A postmodern understanding of knowledge conceives of multiple, pluralistic understandings of knowledge which are all socially constructed, that is, composed inter-subjectively, so that it might be claimed that many *knowledges* 'exist'.

As described above, Foucault's (1980) views of knowledge, as essentially discursive and socio-political, have been highly influential to the postmodern movement, focusing attention on the means by which knowledge is produced and maintained and the effects of certain forms of knowledge. Consequently, the postmodern conceptual framework portrays knowledge as always contested and partial, shaped by the interplay of language, power and meaning. As such, the effects of postmodernism have been to undermine the more confident interpretation of the modern era, leading to an understanding of knowledge as always an interpretation which is never arrogantly assumed to be closer to a true account than other interpretations.

Clearly, how individual researchers align themselves regarding these questions has also tended to determine the manner in which they conduct their research. Researchers who gravitate towards the notion of objective knowledge, either explicitly or implicitly, tend



to view their role as observers of phenomena and adopt more traditional research methods. Conversely, researchers who understand knowledge to be personally and/or socially constructed, contested, context specific and thereby also enactive and unique, have evolved research techniques which favour and acknowledge their interpersonal involvement and their impact upon the knowledge subsequently acquired.

This less orthodox, postmodern view of knowledge is central to the 'new paradigm' research methodologies such as action research and practitioner research, as I will discuss below. This view of knowledge has also significantly influenced how I have understood my own practice-research endeavour. These contemporary research approaches frequently espouse a desire to improve and to change people's lives, and so consequently knowledge becomes something which is not simply sought for its own sake, but rather as a means towards fostering social improvement and specifically towards the improvement of expert practice. This has led to new paradigm action researchers embracing the idea of an epistemology of practice established through practitioners' individual epistemologies of their practices (Schön, 1991; Lomax et al., 1996b). However, Eraut (1985) noted that in part the difficulty in acknowledging the significance of tacit practitioner knowledge was that, unlike research derived academic knowledge, practitioner knowledge was usually much more difficult to codify in written forms, being best expressed only in practice, and that it usually could not readily be reduced to simple technical notes.

### *Addressing Criticisms of Postmodernity*

The tendency of postmodernism to blur distinctions and to eschew acceptance of an invariant perspective on any social phenomena has also become a particular focus of those who have criticised it. Critics of postmodernism (e.g. O'Neil, 1995) accuse it of leading to the end of all fixed meaning and to the erosion of any epistemological distinctions between belief and knowledge, science and literature and even between truth and falsehood. Consequently, a postmodern perspective is seen as threatening the possibility of forming any accurate representations of what is real and therefore of any definitive truth. It is criticised for inevitably resulting in a loss of traditional standards and an irrationality where anything goes and where progressive action, either political or scientific, is impossible. Critics suggest that a stagnant perspectivism, a solipsism or relativism will be the likely outcome of pursuing a postmodern perspective (Hartsock, 1987).



However, Lather (1989a, pp 320-321) directly countered accusations of relativism and nihilism in postmodern thinking, by arguing that the notion of relativism was part of a modernist foundationalist belief, claiming that:

“If the focus is on how power relations shape knowledge production and legitimisation, relativism is a concept from another discourse, a discourse of foundations that posits grounds for certainty outside of context.....relativism foregrounds the shifting sands of context but occludes the play of power in the shaping of structures and circumstances”.

Lather (1990, p. 74, quoting Harding (1987, p. 10)), also argued that what was needed was to “relativize relativism itself.....Historically, relativism appears as an intellectual possibility, and as a ‘problem’ only for dominating groups at the point where the hegemony of their views is being challenged”.

Lather’s (1989a, 1990) point seemed to be that relativism as a concept is related to a dualistic ontology and is therefore only an issue within the context of a modern, foundational epistemology which posited ‘positions’, for example, an absolutist position versus a relativist position. Consequently, relativism could be seen as simply the flip-side of the modernist epistemological coin, tied to the idea of absolutism. However, according to Lather, within a postmodern paradigm both absolutism and relativism are seen as constructed concepts, rhetorical manoeuvres and linguistic ploys; both are the effects of power play in language and have no meaning outside of the dynamics of the power/knowledge nexus. This constructed and linguistic aspect of the absolutism/relativism binary is not recognised by the modernist paradigm, which essentially reifies the positions as ‘out there’ and objectively descriptive of potential positions one might ‘take’. Lather (1989a) also challenged those who appeared to imply in their criticism of postmodernity that, “if we cannot know everything, then we can know nothing” (p. 321).

Clifford (1986) argued similarly, in relation to the possible multiple interpretations that he believed will inevitably be associated with contemporary postmodern ethnographic research and writing. He claimed that such fears of relativism largely confused contests for meaning with disorder, frequently reflecting a desire to maintain an objective



narrative which was reluctant to acknowledge and reflexively locate its own means of construction.

Despite the accusations by critics of the potential nihilism of postmodernity, as a paradigm it appears to have generated a substantial and growing body of research and associated literature, together with a plethora of practices within education and health, as I will describe below and within the later chapters of this thesis. These practices have been developed by those who claim postmodern positions or sympathies and, in their efforts, are struggling with the possibility of change through research and practice; that is, research and practice which is sceptical of and eschews a foundational or secure epistemological basis.

While postmodernity may challenge claims to the neutrality of knowledge, asserting this as a fiction, Quinn (1982) argued that knowledge could be recognised to be effectively ‘objective’ in its application, as some knowledge generally also ends in action that has consequences. As such, Richardson (1990b) cautioned against a too radical postmodernist approach, suggesting that we must not assume that “because all knowledge is partial and situated it does not mean that there is no knowledge or that situated knowledge is bad” (p. 27). Likewise, Lather (1990) stated that, “While “the real” is mediated through language, it has not disappeared” (p. 72).

Polkinghorne (1992, p. 151), while acknowledging the potential difficulties that the fragmentation and the lack of foundation postmodernity appeared to imply, argued that postmodernity also offered a ‘neopragmatism’ which challenged those who accused it of nihilism. Polkinghorne suggested that:

“neopragmatism shifts the focus of knowledge generation from attempting to describe the real as it is in itself (theoretical knowledge and ‘knowing that’) to programs to collect descriptions of actions that have effectively accomplished intended ends (practical knowledge and ‘knowing how’)”.

Polkinghorne appeared to be referring to a pragmatic validity of postmodern practice that I shall return to below in a more thorough discussion of validity. Again, such claims represent a utilitarian or performative understanding of postmodern knowledge, in which knowledge is valued for its ability to help practitioner’s tackle the problems of practice.

Seen in these terms, knowledge, to be of value and to counter nihilism, does not have to provide an all-embracing account of reality, but rather only to provide effective knowledge(s) for practice which brings about the desired change.

Aside from accusations of relativism, postmodernism has also been challenged as potentially undermining the plight of minority groups (Hartsock, 1987). This is because postmodern theories of power, language and subjectivity might be equally applied to questioning and highlighting the contradictions within research and practice which is explicitly committed to any particular ideology, including those in pursuit of social justice and liberatory politics (Lather, 1991). Bograd (1992) had also questioned, from a feminist position, the implications of practice based upon postmodern and social constructional ideas, concerned that such practice might assign no preference towards one position over another. According to Bograd, this could be both naïve and dangerous. Speed (1991) likewise argued that the social constructional stance regarding reality was not sustainable by committed experts who are inevitably called to deal with 'real' problems.

Clearly, for contemporary researchers and particularly those who aspire towards emancipatory or critical ends, postmodernism presents as much of a challenge as it does an opening of opportunities to undermine the modern hegemony. Perhaps this dilemma may also partially account for the tendency of postmodern social research to emphasise the local over the general and, ostensibly, practice over theory, in that any claim in the legitimacy of the research does not aspire to go beyond the immediate, the temporary or the specific. In the present climate of research and expert practice, in which all theories are being undermined and when the methods and motivations of the researcher and expert alike are being held up to close scrutiny and questioning, this may encourage a greater consideration of the processes of practice. Indeed, as Marcus and Fischer, (1986, p. 166) suggested, "In periods when fields are without secure foundations practice becomes the engine of innovation".



## **2.4. Conceptually Aligning My Practice-Research With The Postmodern**

“In the postmodern, there is a questioning of whether knowledge is established through systematic empirical observation and experiment mediated by reason or whether a necessary first step requires *a shifting of the way the world is seen and a construction of a new world to investigate*” (Usher et al., 1997, p. 204, emphasis added).

The above quotation captures the essence behind the alignment of my own practice-research towards the postmodern. In this section of the chapter, I therefore aim to describe how and why that alignment arose and the realisation of the necessary shifts in how I saw the world, regarding both my practice and research.

Before I begin that task, I would like to explain to the reader that I use the term ‘align’ deliberately. While I am aware that some may read the ambivalence suggested by this term as an untenable position (e.g., Guba and Lincoln, cited in Greene, 1998) I was interested to read that, according to Greene, others, “agree that paradigms are irreconcilable, yet still seek not accommodation but dialectically enhanced inquiry benefits through a pluralistic acceptance of multiple ways of knowing” (p. 387). Indeed, I see this position as being entirely in-line with my reading of the postmodern, as I have described above and as I will discuss and argue regarding practice in the later chapters of this thesis. That is, if postmodernity questions an either/or stance towards knowledge and understanding by proposing a both/and perspective, then subscribing wholly to the postmodern seems to paradoxically suggest the pursuit of certainties associated with modernism.

Furthermore, in ensuring that my account is reflexive I have to acknowledge that, given my own modernist cultural legacy, stemming from my professional education, I find attempting to consistently maintain a postmodern perspective extremely difficult. I recognise that in effect I might more accurately be said to shift between the two conceptual positions. In fact, the form and structure of this thesis illustrates my present conceptual position. That is, while it may not reflect the style of a conventional thesis, nevertheless its structure, logical sequence of chapters, use of numerous citations of authors to legitimise points, all attest to my underlying modern inclinations. It is far from the radical postmodern educational theses presented in the forms of novels or



paintings that some authors have advocated (Slattery, 1997). Nevertheless, I do not feel that I need to excuse this, as it accords with my present understanding and beliefs regarding both research and practice in which I am striving *towards improvement* in my practice, with a deliberate desire to make an original contribution to educational knowledge. This could be described as an integrative position, drawing upon both modern and postmodern perspectives, although it is towards the postmodern that my preferences gravitate.

Essentially, the alignment of my practice-research to the postmodern conceptual framework stemmed initially from the nature of my expert practice experiences within Namibia and also from my subsequent search to methodologically locate that reflective practice and those experiences. Although I will describe my experiences gained while working within Namibia in greater detail within Chapter III, I believe it will be helpful to the reader if I briefly outline some details at this point so as to highlight the emergence of postmodern themes.

My role as an educational psychologist in northern Namibia provided me with extensive opportunities not only to work with and alongside local colleagues and families who were from a very different culture to my own, but also to live within these communities. As part of our working and living together, we were obviously obliged to share our understandings about a wide range of topics and issues, related not only to educational matters but also concerning what we considered to be personally valuable and important and, more generally, how we understood the nature of things, our worldviews. Regarding my practice, I began to realise that in order to achieve my initial aim, which was to improve the department I managed by implementing the Portage Programme so that it was relevant locally, I had to first address how I could improve my own expert practice in relation to working with my colleagues and local families and also in terms of my wider thinking about the Programme and its purposes. As such, I also started to understand that my task was not, as I had earlier anticipated, primarily a technical one, rather it was necessarily one in which I had to work towards forging collaborative and productive relationships with my colleagues.

In the course of our working together I soon appreciated the depth of the difference in some important areas that seemed to exist between my colleagues and myself, related to



our values and worldviews. At times I found these differences in our attitudes and ideas astonishing and even unsettling. Yet it was through such experiences that I started to fully grasp, that is to understand not only *intellectually* but *experientially*, that these differences stemmed from the very different social constructions related to our socio-cultural backgrounds. Moreover, I started to understand that my colleagues too found some of my own ideas, values and worldviews equally as alien. I was then able to take the next conceptual step and consider how all that I had held to be 'true', my own worldviews, were as equally constructed and contingent upon my socio-culture embeddedness. Effectively, these experiences were my first conscious and experiential encounter with the concept of self-reflexivity. The awakening in me of this new understanding, and the transformation in my thinking, signalled the beginning of my own reflective and reflexive practice, which was to continue beyond my stay within Namibia.

Later, through further 'research' into my own experiences and practice and the implications these had for my understanding of the Portage Programme, I began to encounter the ideas of social constructionism and also postmodernity which seemed to both resonate with my own experiences and to provide a language with which I could further understand and re-theorise them. In this sense, as I shall refer to below, I began to experientially understand the dialectical relationship between practice experiences, informal theory and theory described by Usher et al. (1997). These then were the initial *practice* experiences from which my reflective practice sprung. They led to me being interested in and receptive to new ways of understanding myself and my expert practice and programmes associated with my practice. However, while I began to recognise the relationship of my shifts in understanding regarding practice and the alignment to postmodern ideas, I did not initially make this connection between my understanding of research and the postmodern.

At the beginning of my search for a means to represent my reflective practice, my understanding of research was narrowly drawn from my professional background. As a psychologist my professional training had been firmly entrenched within the developmental tradition of Western psychology, which embraced behaviourism, positivism, psychometrics and statistics, together with a privileging of objectivity and a suspicion of subjectivity. My earlier understanding therefore was that research, whether paradigmatically empiricist or post-positivist qualitative research, usually assumed a



particular sequence of steps that was commonly linear. My nascent understanding of action research was that it too typically started from the researcher identifying a particular problem within their practice which needed to be solved and which became the deliberate focus of the research. A specific method of inquiry was then chosen from the researcher's favoured methodology and 'the method' systematically applied until a point in the research was eventually reached when the research ceased and the research report was drafted. The 'self' of the practitioner-researcher as a learner within the research process was downplayed or absent. Also, to my earlier understanding, the process of drafting the research text belonged to the post-research period, with the text conveying that which had already been understood or 'discovered' during the research period. Consequently, this very narrow earlier understanding of research did not seem to provide a sympathetic means of representing my own reflective-practice experiences nor my emerging postmodern practice sensibilities.

I therefore began a lengthy search for an appropriate research methodology, one that led me to extensively read the literature related to qualitative methodologies. While the literature appeared to offer some insights and I was able to read of researchers who had shared difficulties similar to my own, none seemed to be wholly satisfactory. Most, although not all, seemed to assume the researcher was working alongside the practitioner, such as to help them to improve their practice. That is, the research had been pre-planned and was not, as in my own case, a spontaneous feature emerging out of practice. Alternatively, I noted that, in cases where practitioners were researching their own practice, this frequently appeared to entail them stepping outside of their practitioner role and/or engaging in research practices borrowed from known research methodologies, which were often strange to and not directly compatible with their practitioner roles. This might include subjecting colleagues to interview schedules, inventing questionnaires, spending time observing or shadowing colleagues, writing research reports which in themselves were not part of the practice, and so on.

However, my search was driven by a desire to find a methodology that would allow me to include both the changes in my understanding about the purposes of the Portage Programme, and the mutually associated transformations in my thinking about my role as an expert practitioner, and also my gains in personal knowledge. Furthermore, I recognised that the ongoing process of my reflective practice had itself generated further



shifts in my understanding and knowledge concerning my professional self, expert practice and the Portage Programme. That is, I realised that the research methodology I chose would have to allow me to portray research as inherently a learning experience, so that research did not just lead to further learning, but was itself actually learning. Or, as Usher et al. (1997) claimed, research itself becomes effectively a process of self-understanding. Moreover, as I began to research into research, I gradually understood and acknowledged how my own reflective practice and research was also an intuitive, emotive and aesthetic process (Brookfield, 1987; Mezirow, 1991), and that it might be understood in wider socially constructional terms, rather than simply representing it as an individualised, cognitive process.

In my search for a methodology, I have also struggled with the question of how such research might be written so as to include my own emerging personal voice, as well as to provide a description of my situated struggles as an expert and a learner. I have also been plagued by the question of how I was to structure my practice-research text so as to include the continual journey of discovery and learning that I recognised was a significant part of research, including the drafting of the research text. That is, I realised that the practice of writing the research itself could also be considered to be a crucial part of the broader practice-research endeavour. Indeed, this view would seem to tally with Denzin and Lincoln's (1994, p. 10, my insertion) understanding as they argued that, "fieldwork ['research'] and writing blur into one another. There is in the final analysis no difference between writing and fieldwork. These two perspectives inform one another throughout".

Fortunately, at some point in my journey, I realised that the shifts in my understanding regarding expert practice, which I have described above and which I had related to the concepts of postmodernism were also connected and indeed were mirrored by the shifts in my wider understanding of the nature of research. As I shall describe in relation to changes in the Engela Portage Programme and my understanding of my practice later in this thesis, this seems to be a further example of an isomorphic relationship, or parallel process, between my ideas of practice and my understanding of research (Liddle, 1988; White and Russell, 1997). I realised that questions of ontology, epistemology and therefore also methodology, were equally as related to my research as they were to my reflective expert practice. As I shall discuss below, both reflective expert practice and



research could be said to be mutually dependent and to inform each other and it was possible to conceptualise an epistemology of reflective practice embracing both. Spurred on by this realisation, I began to research further into the shifting understandings regarding both practice and research and this in turn helped me to refine and develop my 'new paradigm' methodological concepts. Through my wider reading I also recognised that the problems that I had struggled with in my search were also part of the shifts in understanding and the claimed crises of representation and legitimisation of social and educational research, brought about by postmodernism and which I will now describe below.

## **2.5. Framing My Own Research Within Shifting Understandings Of Research - Towards A Methodology**

In this section I have attempted to highlight and describe specific areas in which my own understanding regarding research and practice has shifted and how this new understanding, which stems from a postmodern perspective, contrasts most significantly with more conventional empiricist approaches to research. The particular issues I describe below represent stages in my own learning experience as I endeavoured to locate my practice-research within a methodology. I have also focused upon issues which allow me to address a central question regarding how I understand my practice-research to constitute not only research, but 'good' and valuable research leading to worthwhile and original educational knowledge.

### **2.5.1. Definitions Of Research**

Essentially, my methodological search has been driven by the question of how research might be defined and how my own experiences might be related to the prevailing views regarding research. As I have also suggested above, questions about how research is conducted, and what does or does not count as research, are highly contested topics of discussion within the contemporary field of social and educational research. New forms of knowledge production, that is research, are emerging which challenge more conventional conceptions. Yet, regarding present practice within education, it is not uncommon to continue to find calls for practice to be bedded in 'solid' research findings. Much of the literature surrounding this debate frequently appears to continue to privilege more traditional views of research (e.g. Silverman, 1985; Cohen and Manion, 1994). As I have described in relation to postmodernity and knowledge, it remains the popular



notion that ideas stemming from positivistic research represent a superior form of knowledge from that which might be developed or evolved through general everyday practice or less systematic ways of working (Semin and Gergen, 1990). Research-derived knowledge is usually given greater value than other forms of knowledge, such as that represented by 'tacit knowledge' or traditional knowledge derived through generations of continued practice and through experiential learning. Indeed, research-based or evidence-based practice seem to be current buzzwords, with academic journals frequently focusing upon the debate regarding the supposed gap between research and everyday practice and the relationship between the two (e.g. Hammersley, 1997; Hargreaves, 1997; Whitehead, 1997).

Research is commonly associated with science, with science traditionally understood as concerned with the formulation and attempted falsification of hypotheses, using reproducible methods that allow the construction of generalised statements about how the universe behaves. The process of implementing these methods or of going about science is, of course, known as research. The constructions of generalised laws is deemed important, from this positivistic understanding of research, because these laws form the foundations of theories and also allow for predictions to be made on which, for example, policy might be established and decisions made. It is this traditional conception of research which has led to the assumed distinction between researchers, who are interested in developing theory over any concerns with practice, and practitioners who are preoccupied primarily with practice (Semin and Gergen, 1990). It is also this traditional notion of research which seems to have remained influential and firmly fixed in the general understanding of Western society to date and which, as judged by the perpetual concerns with validity and rigour in the research literature, appears to continue to haunt even researchers with postmodern sympathies.

More recently however, even the underlying ontological belief of natural science in an orderly, law-abiding universe has been challenged by events such as the advent of Quantum Theory, Chaos Theory and the mathematics of complexity. These new theories claim that the universe, rather than being stable and determinate, might be constantly in flux and that "The world thus appears as a complicated tissue of events, in which connections of different kinds alternate or overlap or combine and thereby determine the texture of the whole" (Heisenberg, 1971 quoted in Capra, 1997, p. 30). Gergen (1973) also argued, in relation to social phenomena and processes, that these are largely



spontaneous, unique and non-repeatable, so that any attempting to apply positivistic research approaches must be considered as inappropriate. Others too have claimed that there appears to be little order or apparent rational reason in social phenomena generally, so that the patterning of life does not seem to fit the orderly cause and effect ontology of the natural sciences. Consequently, according to Gergen (1973), the social sciences, such as psychology, from a social constructional perspective become not scientific inquiry but effectively historical inquiry, in that they are both socially and historically located practices. Gergen (1973) suggested that this was because social knowledge cannot accumulate in the usual scientific sense because such knowledge does not generally transcend its historical boundaries.

Moreover, practitioners have become increasingly dissatisfied, not only with the traditional methods of research but also the traditional products of research which seemed to often have questionable relevance to the realities of their practice and lives. As with the disillusionment with modernism that I described in the previous chapter, so in general, the traditional positivistic and empiricist based models of research have not been able to construct valid causal relationships which have had any reliable or useful predicative value, suggesting that they have questionable relevance to social and educational practice. This has led many educational and social researchers, and those who were dissatisfied with the worldviews and values of the positivistic hegemony, to call for new approaches or new paradigms to research which are more appropriate for the complex indeterminate world of social interactions, where 'subjects' are themselves interpretative and not silent or passive objects of study, as the positivistic approaches seem to assume.

The shortcomings of traditional scientific approaches and associated generalised theory have not only been evident to educational and other practitioners. The rise of alternative and what are termed 'new paradigm' (Reason, 1988) research approaches, such as action research and practitioner research, has also stemmed from the concerns of feminist, environmental, post-colonial, gay and ethnic minority groups. Such groups have been discontent with the patriarchal and colonial authority inherent within more conventional research methodologies, with their implicit covert values and, it is claimed, subjugating knowledge systems of normality. Rather these groups have called for research which is openly ethical and value conscious. New paradigm research has therefore emerged both



as a reaction towards the limitations of positivistic social research, and also from a need for a more encompassing and relevant understanding of research which related to people's understanding of their own circumstances, whether as professional practitioners and/or minority group members, and the diversity of their worldviews and values.

Within the contemporary field of social and educational research, there has therefore been a growing tendency and shift in the understanding of research to privilege either personal or minority groups' experiences, both as a subject of research and as a form of research relevant to the concerns of individuals or groups. Many of these new paradigm approaches appear to embrace postmodern themes as described above and often claim to attempt to liberate the expert, whether researcher or professional practitioner, from some of the narrow, ethnocentric Western conceptualisations, such as those associated with rigidly materialistic and linear views of progress and causation and global one-size-fits-all solutions to problems. The chief challenges to the positivistic epistemology have also included an awareness and a questioning of conceptual paradigms. This has led to a very different understanding regarding knowledge, as described above in the section on postmodernism, in which knowledge is seen as historically situated and related to those who experience it, and therefore fundamentally subjective, as well as locally and culturally bound. I shall return to discuss new paradigm approaches to research and the bearing upon my understanding of research later in this chapter.

Additionally, the lack of questioning of its own epistemology demonstrates, according to Usher et al. (1997), how positivistic science and research lacks reflexivity, in that, while it is methodologically critical, it is not self-critical. Usher et al. (1997) also claim that as positivistic research has been overly concerned over method, this has led researchers to both understand research as primarily a technical exercise and so to fail to ask questions about the process of research itself. Again, I see a parallel here with my own concerns that the Portage literature primarily views programme development as a technical endeavour at the expense of questioning the processes of expert practice.

Also, if Kuhn's (1996) analysis of scientific progress is correct, then the practices of positivistic science and research are themselves essentially subjective and hermeneutic, in which research methods are judged to be valid or not depending upon the judgement of the dominant community of researchers at any particular time in the history of the development of the paradigm. Semin and Gergen (1990) also argued that the social



sciences and society are inextricably bound up in 'feedback loops' and that science and research could not stand outside of general social practices. Therefore, the practices of positivistic science itself might be said not to be positivistic. Usher et al. (1997, p. 180) also proposed that, if such questions are asked of science and positivistic research concerning its practices, then it is possible to argue that, "The 'truth' that the natural sciences' own epistemology seeks to convey is belied by its practice".

In contrast, it is the reflexive questioning of research's epistemological assumptions, and with what it means to do research and the effects of research, which seems to draw the diverse range of postmodern and new paradigm research methodologies together, while also setting them apart from the 'old' paradigm of the natural sciences. Postmodern and new paradigm approaches essentially recognise the fundamental hermeneutic and interpretative aspects of all research, in that the researcher inevitably brings to the process of research their own pre-understandings and cultural traditions, which they employ in order to understand the research practices and products before them.

Again, following Kuhn's (1996) analysis in which he saw science and research as a socio-historical process, it could be said that the emergence of postmodern research paradigms represents the formation and views of a new research 'community', following the awareness of anomalies and limitations of the 'old paradigm'. That is, a community in the sense that the members recognise, share and value an alternative notion of knowledge and particularly knowledge and understanding of research and its relationship to expert practice. This new community is interested in addressing and investigating personal and practical and professional problems, often with an openly political and therefore subjective agenda on the part of the researcher or practitioner. Also, the 'old' binary oppositions inherent in positivistic research, such as the separation of object and subject, the researcher and the researched, and values and ethics from methodological issues, have been exposed and challenged by the new postmodern community and their research methodologies.

It is notable that postmodern and new paradigm approaches also frequently privilege problem-solving over theory constructions, or at least theory constructions in the conventional sense. Postmodern and new paradigm approaches might therefore be said to have helped to redefine research not as a straightforward technical process, but as a socially located subjective process which will differ within different 'communities'.



Lather's (1990, p. 65) definition of science seems to convey this dynamic convoluted understanding, when she described it as, "a much contested cultural space, a site of the surfacing of what it has historically repressed".

Therefore through this process of researching research, I have been called to question my own positivistic understanding of research, particularly the understanding of methodology that I previously understood and took for granted. My search has been for a methodology which would allow me to detail and describe the richness of my educational experiences within Namibia, and to understand and describe the processes and effects of the dynamics of interaction between myself, my Namibian colleagues and with the specific context in which the Engela Portage Programme was located, together with those reflective experiences that have occurred subsequently. Clearly, this had to be an approach that was primarily concerned with questions of local practice and problem-solving and reflexive analysis, rather than simply generating predictive theory. I have been able to appreciate how conventional research has overlooked the importance of reflexivity and it seems that reflexivity is the common conceptual thread that unites and binds the key elements of my experiences. Below, following a consideration of the crisis of representation within research, I would like to consider the relationships between these elements in more detail, as a means to try to tease out a broader and more relevant understanding of how I have come to position my practice-research.

### **2.5.2. Social and Educational Research in Crisis**

In his analysis of the impact of the social upon views of research, Popkewitz (1988) acknowledged both the fundamental social constructional and contingent aspects of our understanding of research and the restrictions that conventional research boundaries, those boundaries which have been shaped by notions of research in the natural sciences, seemed to have imposed upon the individual researcher. As Clandinin and Connelly (1998, p. 153) noted, "we see shifting frames of reference that define acceptable knowledge and inquiry", so Eraut (1985) similarly recognised how, within contemporary research, the time seemed to have arrived to consider new means by which to begin to recognise the knowledge-creating capacity of practising professionals, rather than, as has traditionally been the case, seeing this as solely the preserve of academic institutions. Such 'new means' appear to have been fostered by the advent of the postmodern, whose challenges to former ways of understanding, as I have described above, have created a



shock-wave through the disciplines of social science and education. The questioning of ontological assumptions, the understanding of epistemology as a constructed discourse, and the views of social reality as indeterminate, all have implications for the traditional methodological assumptions and basis of social and educational disciplines.

It is this questioning which has led some social scientists and educational researchers to begin to reconsider the nature of social theories and methodologies which have traditionally underpinned research aims and practices, and which have brought issues of ontology and epistemology to the forefront in any educational research endeavour.

These concerns, regarding the shifting understanding of social and educational research, as I have explained, are also very much the specific focus of both this chapter of the thesis, in that they set the context in which this thesis will be read and judged, and also in the related implications to expert practice as described in this thesis generally. They are concerns which go to the heart of the difficulties that I too encountered in my attempts to search for an adequate research methodology with which to begin to understand and to share my personal knowledge of the profound changes to my understanding of expert practice and programme development which occurred during and following my involvement with the Engela Portage Programme. These problems are fundamentally problems of *representation*. I have also had to acknowledge the irony, in that while recognising that I am fortunate to be writing my research at a time in which there appears to be a plethora of research methodologies and paradigms that would seem to allow the inclusion of my reflective practitioner-research experience, this very abundance has also resulted in there now being no clear authoritative framework within whose certainties I might shelter.

This 'crisis of representation' (Marcus and Fischer, 1986; Richardson, 1990a) has also been variously described as the "Double Crisis" of representation and legitimisation (Denzin and Lincoln, 1998, p. 21), and more recently including reference to praxis, as the "triple crisis" (Denzin, 1998, p. 3) of current qualitative research. It is the acknowledgement of these crises which led Elliot Eisner, like Eraut (1995), to challenge the educational research community to find new forms of representation for educational research and to consider new research methods, so as to fully encompass the experience of professionals as:



“experience is the bedrock upon which meaning is constructed and that experience in significant degree depends on our ability to get in touch with the qualitative world we inhabit....Out of experience concepts are formed....Experience, however, is private. For experience to become public, we must find some means to represent it” (Eisner, 1993, p. 6).

Moreover, as Usher et al. (1997, p. 120) argued, postmodernism also challenges the conventional understanding of the ‘cause-effect relationship’ between experience and learning, so that this is might be reconceptualised “with learning becoming experience - experience as the source rather than the raw material of knowledge”.

This thesis, then, is my attempt to *represent* my own research related to my professional expert ‘experience-learning’ and the personal understanding, knowledge and concepts which arose during my involvement with the Engela Portage Programme and which have continued to develop subsequently. Through the course of reflecting upon my practice within Namibia and trying to theorise the changes that took place, together with my search for a means to represent these ideas, I have been drawn as I described above to the postmodern conceptual framework and inquiry paradigm. The ideas within the postmodern seem to both reflect my own experiences and have also provided me with further ideas with which to build upon and extend my learning.

Denzin (1998, p.3) also aptly described the difficulty of representation in current qualitative research particularly for researchers, such as myself, who wish to represent within their research text their personal experiences and learning. Denzin drew attention to the fact that:

“researchers can no longer directly capture lived experience. Such experience ... is created in the social text written by the researcher. This is the representational crisis. It confronts the inescapable problem of representation but does so within a framework that makes the direct link between experience and text problematic”.

While traditional views of writing, lodged within a positivist epistemology, suggested that the text could reliably convey what was presumed to be an objective reality, such as concrete experience, open to ‘capture’ by the ‘knowing’ researcher’s/writer’s careful observations and then analysis of their field notes, interview data, and so on, the rise of postmodernism has questioned the ability of the researcher/writer to mirror reality in this



fashion. Instead, through literary and rhetorical structures, “writing creates a particular view of the reality” (Richardson, 1990b, p. 9).

Research writing and language are therefore not innocently transparent and there is no final, ‘truer’ representation of experience and events. Rather there are only different textual representations and readings of experience in which the partialities, the values, the ‘will to power’, the intentions and the beliefs of the researcher are centrally implicated. However, as Lather (1993, p. 3, quoted in Denzin 1998, p. 5) claimed, “these arguments do not put an end to representation, but rather they signal the end of pure presence” so that, “description becomes inscription [producing new discourses]. Inscription becomes evocative representation”.

All of this calls for the centring, that is, the writing of the researcher into the text they produce. Given the postmodern context, my struggle has therefore been to ensure that I cast my research into a reflective and reflexive narrative - one that thoughtfully acknowledges my subjective impact and the importance of context and social relationships. Consequently, throughout this thesis I have tried to highlight my own partiality and to detail how, in the course of both my involvement with the Engela Portage Programme and subsequently in drafting this thesis, I have developed and continue to develop my own understanding. This also accounts for why I believe this part of the thesis represents more than a theoretical contextualisation and description of the epistemological research assumptions upon which my practice-research is based. Its relationship to the following chapters in this thesis is not simply to serve as a methodological introduction. Rather, this chapter serves equally as evidence of the shifts in my own professional development generated by the act of researching into research itself. It is, therefore, both the ‘product’ of the events and processes described in the later chapters and, as well, simultaneously part of the research ‘process’ or the methodology, in which they too might be understood. It has been research which, as this thesis demonstrates, has been part of my continuing professional and educational development.

### **2.5.3. Reflexivity**

Reflexivity is a major theme that runs constantly through postmodern and social constructional theories of both practice and research. It is also a concept which is both central to my revised understanding of expert practice and research and at the heart of the



second-order systemic perspective of my practice within Namibia that I shall describe in Chapter IV. Reflexivity appears to provide a crucial bridge to what are traditionally considered to be the binary opposites of practice and theory, and practice and research. Usher et al. (1997, p. 137 ) suggested that:

“reflexivity requires that theory and practice are mutually interactive and recognised as such. Here informal theory, by being brought into consciousness, becomes open to change in the light of practice, which itself changes with changes in informal theory”.

Within postmodern research circles, the notion of reflexivity is generally understood as a ‘bending back on itself’ (Steier, 1991) or to ‘refer back’ (Winter, 1989). That is, reflexivity is the process by which the observations and judgements that we make are revealed as dependent upon our previous understanding and expectations of the subject of our observations. Along similar lines and pertinent to the topic of understanding my research and this thesis, Lax (1992, p. 75) suggested that reflexivity was, “the act of making oneself an object of one’s own observations” .

The concept of reflexivity therefore acknowledges the personal element in knowledge claims, such as value preferences, hidden agendas and assumptions, and it importantly renders an understanding of contemporary research as a process which emphasises the ‘self’ of the researcher as an influence not only on outcomes, but also on the language and adopted methods of research. Indeed, when the focus of research shifts to the actions of individual practitioners, perhaps this is unavoidable. As Winter (1998a, p. 362, original emphasis) acknowledged:

“if we are inquiring into a practice or a situation that we are engaged with and committed to, it follows that action research will always have a ‘reflexive’ dimension. In some way, to some extent, at some stage, we will be inquiring into (amongst other things) our *own* practice, i.e. the impact of our engagement, the nature of our commitment ”.

Hence when writing ‘postmodern’, the researcher usually aims to bring their ‘self’ to the foreground of the reader’s attentions. It is a concern with a reflexive analysis that rarely forms the substance of positivistic research or of more technical accounts of expert practice and engagement such as the literature relevant to Portage’s international application. Moreover, it is my concerns with reflexivity in relation to the development



of the Engela Portage Programme and my expert practice that I believe renders my practice-research and the educational knowledge within this thesis as original.

Given the growing significance of a reflexive stance in postmodern research approaches, Usher and Edwards (1994) suggested that reflexivity might also be viewed not only as a helpful means to explore the researcher's or practitioner's own feelings, values and concerns, but that it might also represent an important generative resource within research and practice. That is, according to Usher and Edwards (1994, p. 149):

“reflexivity therefore involves ‘finding out about (or researching) ourselves’ but in the sense of recognising our immersion in the historical and the social, the inscription or ‘writing’ of self in the practices, languages, discourses and interpretive culture which constitutes the practice of research”.

#### **2.5.4. ‘Self’ as an Element of Research**

At the outset of my attempts to write about my experiences and professional practice as a subject of research, it became apparent that, from a traditional positivistic research perspective, I had committed a major heresy. I clearly had both prior knowledge of the research context, in that I was reflectively considering the development of the Engela Portage Programme and my part in that process, and I had also employed my own subjective understanding of the relevant issues to guide the decisions related to my practice-research during the course of that involvement. This seemed to contravene my own earlier understanding of how research should proceed, in which the researcher is assumed to be an objective observer within the context of the research. As described above, traditional positivistic research tends to leave the researcher out of the research text. As I had clearly had a pivotal role in the development of the Engela Portage Programme, about which much certainty at the beginning was based upon my own beliefs, presuppositions, etc., my position as a practitioner-researcher could not have described as objective. I had ‘contaminated’ and was contaminating the research data. Indeed, to a large extent I was the research data.

However, since beginning to encounter the epistemological assumptions of postmodernism and new paradigm methodologies, I have gradually recognised that personal values and personal characteristics are, whether explicitly acknowledged or not, inevitably at the root of all research. The notion of aspiring to the attainment of any



ethical neutrality within the research process is now regarded by postmodern researchers as a further modernist myth. Consequently, contemporary research methodologies are increasingly acknowledging the significance of the individuality of the researcher within the research process and so eschew attempts to objectively sanitise the research process as, for example, it is argued this might restrict the acquisition of valuable practitioner knowledge. Indeed, as I am arguing for within this chapter, if we begin to think about research methodologically as a *personalised activity*, then personal, subjective characteristics clearly have profound implications for the general conduct of research. Moreover, the researcher is effectively always central to the research text, even in more traditional research studies, for example at the level of their intentionality in deciding which aspects of the research questions to address rather than others, and in terms of deciding upon such issues as the organisation of the research data and the style of the report. All of these are inherently linked to the subjective views and conceptualisations that the researcher brings to the whole research process from beginning ideas to end text.

Pertinent to this thesis and concerning the reflexive nature of the postmodern conception of research, Usher et al. (1997, p. 212) emphasised that all research involved, “the practice of writing and rewriting selves and the world”. Krall (1988) referred to this re-writing as ‘re-searching’, and claimed that this re-considering and re-conceptualising of what it is we think we know, represented an essential process for those involved in ‘good’ educational research. Not only does this imply that the practice of writing about research remains part of the research process itself, it also returns attention to the underlying paradigmatic stance and epistemology of the research process. Regarding research writing and subjectivity, Usher et al. (1997, p. 213) also suggested that, “how the self is disposed as an engaged enquirer is a neglected dimension of reflective research practice”. This neglect is a legacy of the shunning of subjectivity which is characteristic of the positivistic research narrative as described above.

However, as I can personally attest, this absence of the personal in research may also stem from the problems and difficult questions that attempting to write ‘the self’ into research presents. There appear to be few conventions or guidelines to which the practitioner-researcher might turn when considering how to approach the problem of structuring research to include the self, despite the fact that for at least the last decade the reflexive nature of postmodern and new paradigm research in particular foregrounds the



role of the self in the research process. Yet it does seem that highlighting the personal and social change that occurred through the process of expert engagement in any application of professional practice and enquiry might add a further illuminating dimension to most forms of research. Indeed, research that does not highlight the personal elements in the research practice might be considered as disingenuous.

Given the emphasis upon self-reflexivity within postmodern conceptualisations of research, there has also been a renewed interest in autobiography as a research practice. Diamond (1992) claimed that increasingly ethnographic educational researchers were adopting postmodern theory and utilising biography and autobiography to learn about practitioner knowledge. Butt and Raymond (1986, pp 62-63) suggested that the value of biography in research was that it allowed for a selection of incidents and experiences from the past, “arranged and linked with respect to an outcome so as to render an intelligible account of how that outcome came to pass” and in so doing brought together experience, thought, action, theory, practice, research development and self-education. Krall (1988) also considered the role of personal history within educational research and suggested that the researcher’s autobiographical experiences potentially provided a means for beginning to understand and research into a host of educational issues and practices. Moreover, Krall claimed that an investigation into autobiography was an *ethical* necessity of research, as it would ensure that researchers would be more inclined to accept responsibility for the social consequences of their autonomous acts of research and practice.

However, Usher and Edwards (1994, p. 148), while also agreeing that there was a personal autobiographical element in research, also warned that this was not solely a personal process. They made the point that:

“autobiography and lived experiences are themselves notions in need of problematisation. A failure to do so assumes lived experiences as ‘presence’, a pure unmediated and authentic knowledge, and autobiography as a true and direct ‘speech’ of the autonomous, self-present individual”.

Usher and Edwards (1994) claimed that such personal experiences are always inescapably constructed within and mediated through wider social discourses, rhetoric or written text, all of which are themselves contingent upon discursive conventions and



rules in which the 'personal' is inevitably situated and embedded. This seems to return attention specifically to the crisis of representing experience within research I referred to above.

Again, this wider, social constructional understanding of the self is very much in contrast to the modernist paradigm and the related empiricist assumptions of positivism. In positivistic research, with the assumption of separation between the knower from the known, this portrays and encourages a view of the 'self' as autonomous, independent, and capable of objective pure rational thought that transcends and is unsullied by culture, traditions, history, values, beliefs and emotions. That is, positivism portrays an image of the 'ideal knower'. Within the positivistic tradition the 'self' is therefore usually considered as more or less self-contained within the individual and a feature of universal and biologically based mental processes which stress the independent functioning of the individual. Reflecting such Enlightenment thinking, empiricist sciences, including much conventional psychology which aspires to the status of the natural sciences, has led to traditional Western thinking being almost exclusively concerned with intra-psychological process and the concept of the self-contained individual (Sampson 1989; 1993).

This broader, postmodern concept of the self that I have described is also a central theme of social constructional theory. Social constructionism understands the self as embedded enactively in dynamic social contexts (Potter and Wetherell, 1987; Sampson, 1993; Shotter, 1993a). This alternative, de-centred view of the self suggests that all human action essentially stems from social interaction and is directed into further interaction. For example, during my writing of this thesis, I am reflecting upon innumerable 'dialogues' and forms of understanding that I have with others from my past and with my assumptions regarding the future readers of the thesis. The manner in which it has been crafted should not simply be conceived as a product of my individual cognitions and understanding, but reflects the wider narrative and linguistic world to which I am subject. The inter-subjective concept of self therefore places an emphasis on relationship as opposed to individual minds. So the social constructional analysis of research considers that the researcher's 'self' might be conceived as an observer community rather than a single person 'phenomena', since the theory claims that individuals construct their perceptions of the world not simply through their individual cognitive



systems but also through linguistic and cultural conversations by which they learn (Hoffman, 1988). Diamond (1993) phrased this as self being understood as relational rather than as a 'thing'. This is not to deny that individually we experientially are aware of our own 'selves', but to acknowledge that this sense of our individual self is socially, linguistically and historically constructed and maintained by narratives and ways of speaking (Shotter, 1993a, Gergen, 1999). These narratives are understood to provide meaning through which we define ourselves and can function to provide both possibilities and limitations to our understanding and rationality. That is, the self is seen as being both socially embodied and socially embedded.

Social constructionism, which I shall describe in greater detail in Chapter IV, recognises that, through interactions with others, we inter-subjectively construct our understanding about the world. Hence, as I experienced in Namibia, opportunities to live and work in, "different cultural texts present different sets of possibilities and constraints" (Usher et al., 1997 p. 102) and can radically present new learning opportunities for the growth of our understanding. This relational understanding of 'self' in research and practice is not one that is commonly included in research writing. Even the text of some forms of new paradigm research, including those which value autobiographic and reflective accounts as research, usually assume or imply in their narratives that the self exists as a unitary whole, which somehow might step outside of itself to reflect upon its own experiences (Jennings and Kennedy, 1999).

Pertinent to my own methodology, Diamond (1992) referred to this wider process of researching into how the self is also located or situated contextually, temporarily and culturally as an 'autoethnographic' process. Such autoethnographic research might, according to Diamond, be used to re-theorise and understand transformations in one's professional practice and knowledge, through recalling experiences and events which contributed to the researcher's own 'story' as they construed it. Indeed, it is through employing such an autoethnographic, self-reflexivity style of writing and research, as evidenced by the narrative style and structure of this thesis, that I have tried to re-search into my own transformations of understanding and practice about both my expert role and the Portage Programme, and evoke the meanings that the experience had for me. In so doing, I have attempted to reveal some of the processes and structures of my personal, expert knowledge. Transformation, and especially the transformation of my self through



my own knowledge and learning, aesthetically as it were, is therefore an important aspect of my own research. Postmodern and social constructional ideas propose that when we have the opportunity of understanding something, we also have the opportunity to re-examine and re-order our previous understanding about what it is we are trying to understand. That is, we have the opportunity to be transformed. As such the analysis of one's own practice and researching one's own act of understanding becomes of prime concern. Again, considering and justifying my own research endeavour, the implication is that, instead of simply studying and inquiring into the technical aspects and physical stages of change in the Engela Portage Programme's development the focus might more usefully shift to considering the recursive processes at work between myself, my colleagues and the local Namibian context. I will also focus upon this self-reflexive, second-order systemic analysis in Chapter IV.

#### **2.5.5. The Relationship Between Theory, Research and Practice**

As part of my endeavour to explain the development of my thinking and understanding regarding my own research and practice methodology, within this section I aim to consider how various authors have described the difficulties with conventional understandings of theory. I will also describe how contemporary ideas regarding theory and theory construction are being interpreted in wider terms, including a synthesis of practice and research so that within a postmodern paradigm theory, practice and research are seen as being necessarily mutually dependent and co-constitutive.

#### **Problems with Theory**

Harré (1981) suggested that within positivism, theories in research are seen as logically ordered sets of laws, so that theories are therefore fundamentally tied to the process of establishing generalised laws and thereby for providing grounds for making predictions and taking action. As such, traditionally research has been understood primarily as the practice by which theory is developed and tested, leading to theory's falsification or verification in order that accurate theory, that which is believed to tally most closely with 'reality', might form the best basis for improved action and expert practice. Within the conventional paradigm, practice is generally understood to be the consequence of the application of theory with, as in my own profession, the practices of educational psychology often being described as 'applied psychology'.



As I have mentioned above, conventionally the responsibility for generating and testing theory has been understood to be the preserve of particular experts - academic researchers. These researchers are frequently distant from the site of professional practice, but their skills are honed towards the particular processes of gathering knowledge, research, as well as constructing theory and generating predictive laws regarding society and human behaviour. Although this modernist conception of theory suggests that theory is primarily concerned with description and explanation, it also implies an ideal of practice (Usher et al. 1997) that practitioners would then be expected to incorporate into their actions. Schön (1991) referred to this as the 'technical-rational' model, in which scientific, research based theoretical knowledge acts as the foundation for expert practice.

Indeed, Polkinghorne (1992) argued that this technical-rational model and division of responsibilities informed the basis of many of the emerging professional disciplines during the later 19<sup>th</sup> Century. In these disciplines the task of professionals became one in which they were expected to learn and to keep abreast of a body of specialised theoretical knowledge and laws 'uncovered' and formulated by their academic, researcher colleagues. As such, professional practices effectively became understood as the application of accepted techniques to meet pre-determined ends, derived from scientific investigation and knowledge.

This apparently tidy relationship between theory and practice however has not been as straightforward as the ideal would imply, and the ability of theory as understood in this traditional sense to helpfully inform and shape practice has been widely questioned. Practitioners within education and health, for example, have faced problems concerning the difficulties of translating scientific, research-based knowledge and theory to meet the problems and demands presented by the messy, indeterminate realities found in the context of practice. Practitioners have been frustrated by the apparent limitations and lack of relevance of such formal, scientific-generated, propositional knowledge to the complex realities of practice, and these problems have increasingly led practitioners to rely upon their own practitioner derived knowledge (Schön, 1987, 1991; Polkinghorne, 1992). That is, these practitioners were opting to privilege relevance over rigour. Investigating how such experience operated in relation to practice, Polkinghorne suggested that it appeared that expert practice involved both accommodating and



applying previous practitioner frameworks of understanding to the uniqueness of their practice experiences. This uniqueness of the practice context effectively meant that practitioners could not rely upon formal theory derived techniques of practice, as these frequently did not match or cater for the complexities of the cases before them. Consequently, Polkinghorne (1992) argued that an epistemology of expert practice inevitably had to rely upon the processes of practice, rather than the formal theory. This privileging of practice over formal research derived theory has also been fuelled by the undermining of the epistemological foundations and claims of positivism caused by the increasing influence of postmodernity, as I have described above.

Problems with the technical-rational model have spurred the genesis of a range of alternative understandings regarding expert knowledge and expert theory formulation related to the generation of experiential knowledge, practices and learning (e.g. Kolb, 1984; Reason, 1988; Schön, 1991; Reason, 1994; Reed and Proctor, 1995). These different approaches and conceptualisations pose questions of how the practices of research might be reconsidered and about the problem of how theory and practice might be integrated. This has led to a burgeoning of the research and practice literature regarding what has typically been referred to as 'reflective' practice and 'action' research approaches, again especially within the fields of education and health research, where the concerns of practice to meet complex problems are perpetual. These action orientated methodologies also usually imply a shared and identical context for both research and practice, so that both are co-implicated and mutually dependent and it is not unusual for the roles of researcher and practitioner to be fulfilled by the same person. Such new paradigm approaches to practice and research frequently propose the concept of practitioner 'reflection' (Schön, 1991) as a means to facilitate the integration of theory and practice with, "reflection on [the practitioner's own] action and for learning linked to future action that characterizes action research" (Eraut, 1995, p. 16).

With the role of the researcher and practitioner being perceived as one, this appears to potentially dissolve the traditional separations between practice, research and theory, although Usher et al. (1997) suggested that this also rendered problematic an understanding of what is meant by these terms and the relationship between them.



*Re-conceptualising the Relationship of Theory to Practice*

As I have described, problems with theory as conventionally understood have been well documented within the literature. However, Usher et al. (1997) claimed that the problems of practice have tended to be overlooked and that merely privileging practice will not suffice, as this simply inverts the theory-practice dualism and leaves practice unchallenged and potentially mired in its own taken-for-granted, habitual actions. Rather, they proposed reconsidering how theory is understood, so that a distinction is made between the formal theory related to explanation and description, and informal theory 'found' in practice.

Usher et al. (1997) asserted that if professional actions are understood as always related to practitioner intentionality, then these intentions are themselves equally an inherent feature of all practice. As intentions are representational of the practitioner's conceptual make-up, then they can also be said to constitute the practitioner's 'informal theory'. Any practice therefore presupposes the existence of informal theory. Consequently, according to Usher et al. (1997, p. 133) "informal theory becomes a condition of practice" and that, "if practice always involves theory, then it follows that theorising, the process of theory-generation, is itself a practice". In this way Usher et al. (1997, p. 134) claimed that theory, that is informal theory, and practice are intimately related and mutually dependent on one another, and informal theory becomes the, "means by which practice is made meaningful". McNiff (1993) had similarly suggested that theory should be conceptualised as an element of practice, so that the processes of theorising and practice became synonymous. In these terms, theory therefore is not something which stands separate and distinct from practice but is an intrinsic part of practice, acting as the initial source of that practice. In other words, theory is the means by which the practitioner first conceptualises the task before them and forms their response, but which thereafter is also itself amenable to change through encountering novel practice situations and problems. This understanding of informal theory appears to relate to the concept of tacit knowledge I mentioned earlier in regard to Polanyi's (1960) work. This view of the interwoven and enactive relationship between theory and practice seems to also embrace both Lewin's (1951, p. 169) observations that, "There is nothing so practical as good theory" with Hunt's (1987) retort that, "There is nothing so theoretical as good practice" (p. 29).



Similarly, Feyerabend (1978) advised that we should understand reason (theory) and practice as part of a single dialectic process, rather than two different entities. Regarding this relationship, Feyerabend (1978, p. 25) used the analogy of a map which guides an adventurer, since:

“Originally maps were constructed as images of and guides to reality and so, presumably, was reason. But maps like reason contain idealisations...The wanderer uses the map to find his way but he also corrects it as he proceeds, removing old idealisations and introducing new ones. Using the map no matter what will soon get him into trouble. But it is better to have maps than to proceed without them. In the same way, the example says, reason without the guidance of a practice will lead us astray while practice is vastly improved by the addition of reason”.

Winter (1998a, p. 371) likewise questioned the image of theory being simply something applied to shape practice and claimed that, “theory in action research is a form of improvisatory self-realisation, where theoretical resources are not predefined in advance, but are drawn in by the process of inquiry”.

So, while this conceptualisation of informal theory is not one in which theory is generalisable or abstract, neither is it unsystematic or intuitive, as it is forged in the enactive relationship with practice which it both influences and is influenced by, so that in the course of resolving practice problems practitioners are themselves generating theory and modifying their epistemologies of practice with which to understand their practice. Usher et al. (1997) equated this notion of informal theory to Schön’s ‘theory-in-action’. However, they also argued that while informal theory, “is a necessary condition for practice, it is not a *sufficient* condition” (p. 136, original emphasis) in that, in coping with the demands of novel and complex practice problems, informal theory needs to also be a source of new, generative practice ideas, while remaining firmly situated in the context of practice. In relation to the development and improvement of practice, however, they recognised that this in itself may also be a source of difficulty, as new ideas for change regarding practice are usually accompanied by a degree of uncertainty and risk for the practitioner. Consequently, informal theory on its own may not lead to practitioners challenging and changing their practice or dealing adequately with practice problems and demands. In such cases, practice problems might be understood as a failure of informal theory, the resolution of which could be understood as a need to change the informal theory which is informing the practice. This



presupposes that the practitioners are themselves aware of the place of theorising in their practice and of the reciprocal relationship played between their theorising and their own practice, which returns us to the question of self-reflexivity discussed above.

Within contemporary research literature, reflexivity in relationship to professional practice and in the context of both practice and research is frequently referred to as 'praxis' (Siraj-Blatchford, 1994; Carr, 1995). Concerning a definition of praxis, Carr and Kemmis (1986), suggested that what distinguished praxis from simple 'good practice' was that praxis was a form of reflexive inquiry which could itself transform the theory which guided it. Carr and Kemmis (1986) also highlighted the role of practitioner intentions, in that praxis, according to Carr and Kemmis, was guided by ethical criteria and personal values which served to aspire to 'good practice'. Praxis was different from the service mode, *techne*, which related to the mastering and the implementation of expert techniques. While in relation to *techne*, the outcome or the product of any practice was generally known to the practitioner prior to the start of the practice process, in relation to praxis the outcome of practice was to realise some moral good, and where this 'good' could not be predetermined it could be realised through the process of morally informed action and never simply as a form of technical expertise.

As such according to Carr and Kemmis (1986, p.33) praxis is:

"informed action, which by reflection on its character and consequences, reflexively changes the knowledge-base which informs it....this way of thinking is dialectical....Dialectic thinking is an open and questioning form of thinking....In this process contradictions may be discovered. As contradictions are revealed, new constructive thinking and new constructive action are required to transcend the contradictory state of affairs. The complementarity of the elements is dynamic: it is a kind of tension, not a static confrontation between two poles".

So in the view of Carr and Kemmis, with regard to praxis, thought and action, or theory and practice, as also proposed by Usher et al. (1997), are dialectically related with knowledge also being understood in dialectic rather than propositional terms as I have described above. This concept of praxis, as a form of informed, committed action inquiry to bring about change, seems to ensure that informal theory is rendered more explicit, so that the conditions and problems of practice might also challenge it and so lead to further changes of practice. Praxis therefore equates to reflexive thinking and reflective practice. Again, as I described in the review of the Portage literature in



Chapter I, it is the sense of professional practitioner praxis that is missing from the standard report narratives of Portage programmes.

### *Re-conceptualising the Relationship of Research to Practice*

With the arrival of postmodernity it seems that the discursive boundaries of research and thereby the understanding of research, have collapsed and merged with those of practice into praxis, as reflexive researchers focus on developing more interactive, value-based approaches to research. That is, within the postmodern paradigm, praxis, as a form of committed action research directed towards improvement and positive change, takes an understanding of research beyond a practice concerned with mere descriptions or interpretation, as it implies that the practitioner inquires into actions to change the very conditions being investigated. Indeed praxis might be re-read as practice-research or reflective practice and I have therefore used these terms synonymously throughout this thesis.

This contemporary nexus of research and practice into practice-research echoes McKernan's (1991, p. 3) definition of research as a, "practice in which no distinction is made between the practice being researched and the process of researching". This relationship between research and practice was also considered by Usher et al. (1997), who noted how the systematic processes of professional practice, including the addressing of questions, issues and problems of practice, implied that effective practitioners are always researchers, although not necessarily in the conventional positivistic understanding of research.

However, the suggestion that good practice might simply represent a form of research has also been a source of criticism of new paradigm approaches to research, as it has been claimed that perhaps the idea of practice-research is not research at all, but simply good practice (Hodgkinson, 1957, quoted in Nodie Oja and Smulyan, 1989). A social constructional struggle over the understanding of these terms seems to be apparent and presumably reflects the socio-political interests of those concerned and the urgency with which some researchers, and particularly those of new paradigm research, desire to be perceived as authentic and respected researchers in their own right. However, even those who advocate new paradigm research approaches appear to be confused or to disagree on this point. For example, Winter (1989, p. 35) argued that research was more than good practice and that:



“a ‘research’ process must demonstrably offer something over and above this pre-existing level of understanding. We need therefore to establish a clear difference of procedure between action-research’s form of gathering and analysing the data gathered through professional practise, and the procedures of professional practice itself. Methods of an investigatory stance must be clearly differentiated from methods for practice”.

While conversely McNiff (1993, p. 39, emphasis added) suggested that, through research, practitioners:

“should be encouraged to develop their own theories....and through their own practices: that is, they should be encouraged critically to examine aspects that they feel need improving, and to work systematically to thinking how (building theories) to carry out the improvement...This process of theorising - that is, forming and reforming theories - *is an integral part of good practice*” .

Questions therefore also appear to revolve around both the definitions of what might constitute ‘good practice’ as well as how we are to understand the relationship between research and practice. Carr’s and Kemmis’(1986) distinction between *techne* and *praxis* seems to imply that, within certain professions, good practice is not synonymous with *praxis*. However, I believe that, within those professions which are concerned with practice outcomes but where both the nature of the contexts in which the course of practice takes place may be highly complex and the form of the practice outcomes may be less clear-cut (such as within social work, education or psychotherapy), perhaps good practice must in addition inevitably always require some reflexive inquiry. On this point at present it appears that the literature regarding new paradigm approach and particularly action research continues to remain divided.

Nevertheless, I detect that overall it seems most authors in defence of new paradigm practice-research or action research argue for such research to be understood as far more than simply good craft knowledge or as Schön (1991) described ‘knowing-in-practice’. In defence of practice-research, it is argued that such research calls for deliberate, conscious and critical awareness, that is reflexivity, by the practitioner-researcher into their own practice, coupled with an openness to the process of change and improvement in that practice. New paradigm research approaches are therefore generally understood to be more than simply an ad hoc process or examples of good craft knowledge, in that they raise to the level of consciousness those aspects of good practice which are, to the most skilled practitioners, intuitive and taken for granted. This, it is argued, should free practitioners from unquestioningly following taken-for-granted paths and thereby assist



practitioners to make explicit and open to criticism, through the research aspect of their practice, the basis for their own practice, so encouraging new and innovative routes to practice improvement.

Beyond a general agreement that reflexivity is called for to render good practice as research, other concepts are invoked to distinguish practice-research from simply practice. Stenhouse (1981) and McNiff (1988), for example, claimed that action research represented 'authentic' research, as it required that practitioners enquired critically and systematically into their practice.

Questions of 'systematicity' therefore also seem to represent a further key consideration at the heart of this question regarding the relationship between research and practice. There are some difficulties here, however, as I expect that generally good professional practice also usually requires that some level of systematic and intentional action is necessary, whether or not a reflexive element is involved. There must also be a question of the degree of systematicity. Therefore McNiff's notion of systematic action alone can be problematic for defining the concept of practice-research and I detect in her text some echoes of the modernist anxieties over research method.

Modernist notions of method, that is systematic research steps, are essentially derived from the underlying positivistic epistemological position discussed above, which is designed to promise that research findings are based upon secure and rational foundations. Claims to knowledge, from a modernist perspective, rest on the assumption that objective truth is still perceived as being discovered procedurally, so the method by which truth was sought during research is all important in the validations of the knowledge claims of that research. Reasoned as such, not just any method will do. However Carr (1997) argued that this promise of discovering truth procedurally has not been and cannot be readily and always kept in educational and social science research, given the inevitably dynamic and partial nature of the research process. Indeed, as I have described, the underlying epistemology of postmodernism implies that there is no general methodology (including experimental designs) that can lead to the kind of certainty that the modernist approach to science hopes to provide. Nevertheless, a concern with method remains topical within educational and social research and, as Carr (1997, p. 204) cautioned, the modernist, "notion of method now shapes the self-



understanding in terms of which educational researchers make sense of what they are doing”.

Lather (1990), also described how from a postmodern perspective methods and methodology are all viewed as political and linked to issues of control, power and attempts to impose legitimacy. Earlier, Polanyi (1960) and Feyerabend (1978, 1987) had similarly highlighted what they understood to be the stifling dangers of following a rigid, predetermined scientific procedure. Ebbutt (1998, p. 422), also questioned the application of predetermined methods to research and practice, claiming that practitioners should, “begin to think about how to work in the swamp of important problems and non-rigorous inquiry”.

Within the Engela Portage Programme, my expert practice and indeed our whole practice as a team was shaped, certainly during the period of my very early involvement, by my own use of two behaviourally orientated, problem-solving frameworks which I had derived from my professional training. These were known as the Problem Centred Approach (Cameron and Stratford, 1987) and the ‘Four P’s’ (Faupel, 1986) which I shall refer to in Chapter III. Both of these could be described as systematic and methodical practice frameworks geared towards development and improvement, but in their lack of any reflexive component, fell short of my understanding of action research or praxis. Later however, as I began to be more consciously reflexive and to reflect upon my own practice, as I aimed to improve my practice and the Programme, both of these frameworks might then have been described as part of my action research and effective practice. However, it was my experience that, despite our considerable pre-planning as a team and my professional conceptualising and following of these frameworks, our actual practice was effectively also significantly shaped by the complexity of the context, which often conspired to undermine our intended systematicity. Nevertheless, the actual course of our practice-research, as a consequence of this disruption, could certainly have been described as in harmony with the context. To that extent, our practice developed a ‘natural’ enactive systematicity and became responsive to the prevailing needs of the Engela Portage Programme, local families, my colleagues’ views and my own, as we strove to develop the service. Indeed, it was through this non-formal but enactive ‘systematic’ process within our practice-research that our practice allowed for the growth of a cumulative tacit, pragmatic and local context relevant knowledge.



I would therefore question any suggestion that action-research must necessarily always wholly follow a formally recognised systematic path. Perhaps the distinction between conventional research's systematicity and that of practice-research, is that in the latter, systematic action is responsive to the sometimes complex interplay between the affective, social and physical contexts and the unfolding events and problems to which the practice is applied, plus the practitioner's own professional awareness and modes of understanding. This understanding of practice-research suggests a more enactive perspective of the process than is recognised by the positivistic or post-positivist epistemology of research. This appears to introduce a further concept with which to understand new paradigm approaches and practice-research, allied with systematicity, that of 'contextualisation'.

As I have suggested above, from a postmodern or new paradigm perspective, it is argued that the greater relevance of theory and research demands a greater degree of contextualisation than is usually the case for more conventional research practices. This certainly seems to be how more contemporary models of action and practitioner-based research are understood. As I shall discuss below, proponents of contemporary practitioner research claim that generative insights are more likely to develop through the researcher's immersion in the milieu of the local context, the tackling of day-to-day issues and by encouraging reflexive awareness, rather than any logical, sanitised sequence of planned action steps. Research viewed in these contemporary terms rejects the narrow pursuit for any underlying truth and the constricted notions of legitimate knowledge of traditional research which denies the full importance of, for example, case-study and localised experience as a basis for knowledge production. As Little (1996, p. 437) suggested, "An acknowledgement of context does not imply a permanent restriction of understanding. It urges caution on those who transfer their conclusions from one context to another".

These notions of degrees of systematicity and contextualisation being employed to understand practice-research certainly remain controversial. However, this fluidity in understanding seemed to concur with my own experiences within the Engela Portage Programme where, as I have indicated, professional action could not always follow the planned or expected course, due to the inevitable unexpected occurrences of everyday



life. Indeed, I found that fortuitous practice changes and my own learning frequently occurred not as a neat linear process, but from a spontaneous and intuitive impulse which seemed more the product of an affective awareness. Likewise, in my practice-research which has continued following my departure from the Engela Portage Programme, my experience-learning, while generally following a rational path of pursuing topics clearly relevant to my research endeavour, has at times also entailed serendipitous, unplanned shifts in the course of my practice-research, some of which were spurred intuitively. That is, they just 'felt' right, others occurred apparently by chance, but which have also proven to be highly beneficial.

This 'intuitional' reasoning is, of course, the antithesis of research as conventionally understood or at least as it is portrayed in positivistic text. What this suggests to me is that along with a re-conceptualisation of the relationship between research and practice, we need to also crucially reconsider the diverse and rich nature that these new forms of practice-research may take, so as to fully acknowledge the breadth of praxis. Perhaps the intuitive aspects of my practice-research, which also guided the direction of expert practice, serves to further demonstrate the enactive impact of the wider context upon practice and also the practitioner-researcher's cognitive theorisations. Goodman (1984) also claimed that productive reflection was not simply a cerebral process of rational thinking, but involved intuitive insights and warned against the denigration of that which could not be fully explicated. Walford (1991, p. 1) similarly asserted that:

"it is now widely recognised that the careful, objective, step-by-step model of research process is actually a fraud .... research is frequently not carefully planned in advance and conducted according to set procedures, but often centres around compromises, short-cuts, hunches and serendipitous occurrences".

### *The Place of Theory*

The above discussion has highlighted how contemporary research literature challenges conventional modernist theory in its relation to both practice and research, and the notion of separate and distinctive the domains of research and practice and the implied rigid ideas of methodical systematicity within both. While it is possible then to trace an emerging inter-relatedness between contemporary concepts of theory, research and practice in which reflexivity and praxis play a central role, the question remains as to the role of formal theory (Usher et al., 1997).



Views concerning the role and place of formal theory remain contested. Theory construction, for example, has been understood as a nearly always delimiting of practice (Kirk and Miller, 1986) while Thomas (1997) went further in claiming that the constraints on creativity and novel discovery were not simply limited to science and non-qualitative research, but applied to most forms of theory based inquiry, particularly within education. According to Thomas (1997, pp 76-77, emphasis added):

“theory of *any* kind is thus a force for conservatism, for stabilizing the status quo through the circumscription of thought within a hermetic set of rules, procedures, and methods...it inhibits creativity among researchers, policy makers, and teachers”.

However, Usher et al.’s (1997) reconceptualisation of the position of formal theory suggested that formal theory might also act as a means by which informal theory and practice could be further questioned and appraised. This suggestion seems to be similar to Schön’s (1991) idea, through which ‘knowing-in-action’ or the theories-in-use by practitioners, which are not always clearly articulated or acknowledged, might be challenged. Usher et al. (1997, p. 138) argued that this could be brought about if formal theory was not understood as something that was applied to practice, but was rather used to critically ‘review’ practice, thereby providing another narrative or “story which elevates the abstract and the universal”. This idea seems to imply that formal theory might represent a narrative of the broader picture which could be used to both challenge or advance informal theory and practice with their narrower context bounded focus, but which itself would be equally informed, challenged and shaped by informal theory and practice. Hence, viewed in these terms, formal theory becomes a necessary partner in a holistic relationship with informal theory and practice, but it is a relationship in which none dominate and is not in itself dominated by the others, but which all parts influence and are dependent upon each other (Usher et al., 1997).

Similarly, it is not a case of formal theory providing the foundational ideas to be applied to practice, as in the conventional sense, but rather ideas to be enacted and employed ‘unfoundationally’ in the process of theory relating to practice. Usher et al.’s (1997) suggestion for formal theory appears to be that it may provide further catalytic potential within the field of practice. Formal theories as discourses, by introducing new metaphors, narratives, or images allow new options for action to be created. From a



social constructional perspective, formal theory might also be reconfigured as a rich resource rather than a deficit, and as a potential for further metaphoric construction. As such, former established theories should not simply be abandoned for the sake of the new and more relevant theories, as these discourses potentially provide valuable perspectives and therefore alternatives for action. They represent part of the stock of stories which can be employed by practitioner-researchers to enhance their understanding. Usher et al. (1997) also warned that formal theory itself, as the product of social practices, is formed in the context of discursive processes in which power relations are implicated and which will inevitably impinge upon and shape practitioners' informal theory. Consequently, for practitioners the reflexive processes of praxis are required to 'review' and focus upon the influences of formal theory, so that a wider dimension, that of socio-political and cultural forces, is also considered in shaping the relationship between research, practice, formal and informal theories.

Usher et al. (1997) also highlighted two further implications of such a re-conceptualisations of the relationship between theory, practice and research.

Firstly, they claim that most authors (they cited Schön in particular) as being too overtly concerned with rationality, that is in the role of 'thought' and 'ideas', while the conceptualised relationship between theory, practice and research equally implicates the determining effects of practice and context upon thought itself. I have already described how I considered that this might have been so regarding the serendipitous and the intuitive aspects of my own practice-research. Similarly, Mayntz (1976), in reference to the development of organisational structures, criticised what he saw as the mythical notion of organisations evolving through rational procedures, in which it is assumed that goals are set and subsequently steps are taken to search (research) for the best solutions to meet these goals from competing alternatives and where "action appears to be touched off by preconceived goals or purposes" (p. 119). Mayntz argued that, in contrast, the order of process is frequently reversed, so that it is the prevailing problems which represent the stimulus to act, rather than any deliberations or theorising of how abstract values might be achieved. This also seems to accord with how Varela et al. (1991, quoted in Capra, 1997, p 262) similarly described situations when, "mind and world arise together".



Secondly, as I have also described above, in relation to understanding the role of 'self' in research, Usher et al. (1997) were concerned that reflection and thought were usually portrayed in too individualistic and psychologistic terms. They claimed that, within research texts and understanding, there was an over-emphasis of the part played by the individual researcher or practitioner, rather than explicitly acknowledging the wider understanding that historical, social and cultural processes play in shaping the reflective actions of the practitioner.

Again, social constructionism would seem to suggest that theory generally is neither true nor false, but deemed to be rational and intelligible, and thereby acceptable, as it is constructed through the complex processes of social interactions and negotiations. Consequently, this perspective encourages a consideration of how theory relates to the ongoing discursive process within a particular context at a particular time. Theories, such as psychological theories, are viewed from a constructional stance as no more than agreed-on understandings that have proven useful in one or more contexts. As no interpretation of reality can be considered more valid than any other, the social constructional focus shifts to deciding how and when a theory may be useful. Any theory in this sense is viewed as a flexible, tentative conceptualisation, which shifts and changes throughout the course of research-practice to reflect changing demands and understanding.

In contrast to Thomas' (1997) criticism of theory cited above, adopting a social constructional understanding might lead us to view theories, such as for example about the course of child development, parenting skills or even our theories of learning, as not to 'blame' for their apparently delimiting effects. Nor is theory therefore necessarily to be understood as a source for conservatism. Rather, this conservatism might be traced to the lack of self-reflexivity on the part of the practitioner-researcher in their use of theory, or in their inability to shift between theories or to create new theories. A social constructional perspective is suspicious of theory, but also recognises the value of theories and indeed the inevitability in their construction, as we turn our researcher and professional gaze on whatever we find of interest. Theories in themselves, therefore, are not restrictive but are useful, if we are able, as I am arguing for throughout this thesis, to embrace a more systemic and constructional stance which allows us to tolerate uncertainty and to see, self-reflexively, our theories as always provisional. It is when we



become too wedded to any particular theories that we essentially become a prisoner of them. Alternatively, if our formal theories are used to inform and are informed by our informal theories through reflexivity, this may provide greater opportunity for the expert to allow space in their thoughts for other ways of seeing and thinking, for accommodating the views of others and for the construction of different theories, as I shall describe further in relation to my own practice later in this thesis.

This dialectic and dynamic idea of theory appears to be similar to the concept of 'living educational theories' (Whitehead, 1989, 1999). Whitehead claimed that educational theory could be considered as constituted by the descriptions and explanations of individual practitioners as they ask themselves, such as through the course of individually orientated action research, personally about their own practice and how their practice could be improved. Whitehead (1999) explained that he used the term 'living theories', in that they explain what the practitioner was doing in terms of their own evaluation of their past practice, with an intention to create a new and unique understanding of their practice and that this effect on the practitioner's future practice constituted the generation and testing of such living theories. That is, the 'living' dimension in the phrase emphasises the developmental nature both of individual practitioner-researcher's coming to know and of the values underpinning their actions in their attempts to improve their own practice. The concept of 'living educational theory' also emphasises the educational originality, the generative and the inspirational aspects in their theories, all of which does justice to the complexity and uniqueness of their own individual research.

To this extent, I can understand how my own specific practice experience and research and my own theorisations, together with the inspiration, knowledge and ideas of other authors I present within this thesis, serves to represent my own evolving educational theory, in the sense that it describes and explains my own educational and professional development as I try to improve the quality of my expert practice, both generally and with regard to the Portage Programme. Ultimately, this is not a theory grounded in the propositional knowledge of other writers, but a theory which has emerged from my own experiences as a professional educational psychologist working within northern Namibia and from my subsequent research and shifts in understanding. It is a 'living' theory as it



continues to unfold dialectically, as I engage with others directly or through their writing and as I read and re-read, write and re-write and so think and re-think this thesis.

Whitehead (1997) explained his ideas for this dynamic relationship between levels of theory and practice for individual practitioners by building upon Winter's (1998a) distinction between general theory, which seems to equate to formal theory described above, and theory as 'improvisatory self-realisation' or informal theory, emerging from the process of action research. Whitehead's ideas regarding the relationship are also similar to those of Usher et al. (1997), as he envisages a dialectic relationship between theory (formal and informal) and practice, that is a dialogue through which the individual practitioners continuously regenerate their own living theories and values in the educative process of their own self-creation. Whitehead (1997) argued that:

"Rather than look to other educational theorists to create our educational theories I am suggesting that each one of us could create their own.....Our educational theories are forms of improvisatory self-realisation in which we create descriptions and explanations for our own educational development" (no page number).

Whitehead's ideas, as well as those of Usher et al. (1997), seem implicit in many of the new paradigm understandings of individual action research that I shall later describe below.

#### 2.5.6. The Crisis of Legitimation - Questions Of Validity

If writing research is not about representing the objective reality of earlier experience, as the crisis of representation suggests, but about fashioning or constructing the research 'findings' into a narrative, this raises the spectre of the second aspect of the crisis presented by the rise of the postmodern paradigm, that of legitimisation, or validity (Denzin and Lincoln, 1998). The question arises as to what criteria might be used to evaluate the research text? Within the more conventional research literature I have encountered as part of my own research, Hammersley's (1987, p. 69) proposed definition of validity remains fairly representative of how the concept is generally understood in which, "An account is valid or true if it represents accurately those features of the phenomena, that it is intended to describe, explain or theorise". However, with the rise of the postmodern, many emerging definitions of validity do not support the 'realist'



assumption within Hammersley's understanding, so that currently there appears to be no common or consensus understanding of validity.

As has been a recurring theme throughout this chapter regarding a range of topics, so it is also the case that the paradigmatic view taken by researchers fundamentally influences any understanding of the nature of 'truth' and, as a consequence, this is also central to any theorisation of 'validity'. Similarly, the shifting understandings of research, theory, method and practice, and the relationship between them as described above, have clearly had significant implications not only for how we define and understand that relationship, but also the status of the knowledge that is generated, its veracity and the process by which this is judged, validation. As such, a consideration of the various definitions of validity also provides another means to reflect upon the wide range of interests that have a stake in legitimising certain practices over others and privileging particular forms of understanding, all of which clearly have a bearing upon my own research.

Conventional modernist notions of validation have largely been related to the process by which researchers support or back-up the claims that they make. Usher et al. (1997) contended that the historical emerging legitimacy of a positivistic understanding regarding validity ensured that observation replaced tradition, so that validity became a function of measurement and inter-subjective testability. Indeed, the scientific method and allied concepts of technical expertise, methodical conformity and ethical neutrality have been largely considered to be the most authoritative of methods for reaching the truth, and this probably also accounts for why the scientific method has been taken up in fields of research well beyond the natural sciences.

According to the positivistic epistemology, all claims to knowledge and how to decide among rival points of view can be judged against how the claim was arrived at, that is, the method employed. Systematic, methodical observation has for positivistic research been epistemologically deemed as superior in authenticating the truth. Denzin (1998, p. 7) also claimed that positivists make no distinction between qualitative and quantitative research and so claim that there should be one set of validation criteria applied to all research, that is "internal validity, external validity, reliability, and objectivity". Denzin (1998) suggested that these positivistic criteria referred to a normative epistemology, in which the normal is assumed to be representative of larger populations and so



consequently little interest is given to less representative, singular and different phenomena. Similarly, Kuhn (1996, p. 5) also argued that “Normal science....often suppresses fundamental novelties because they are necessarily subversive of its basic commitments”. This concern with generalisation is related to an interest in the predictive ability of facts.

Denzin and Lincoln (1998) described how post-positive research approaches have also conventionally understood the validity of any text to be achieved by the use of agreed sets of rules that purport to refer to the supposed reality outside of and distinct from the text itself, while also implying that these should be unique and distinct from those applied to quantitative research. To this end qualitative research has devised an array of research methods in the struggle to ensure and convince others of the validity of such research findings, or if not validity, that the research genuinely reflects some deeper understanding of the topic under investigation. These methods have included strategies such as member checks and peer debriefing (Lincoln and Guba, 1985) and triangulation (Denzin, 1989), etc.

Titchen and Binnie (1994), for example, suggested that, for action research, the validity of the data and any subsequent interpretation could involve three tests of rigour, which were: ensuring that the data is collected from different sources to check out the degree to which those studied do what they actually say they do; through prolonged and persistent observation; and through participant validation, where participants are asked to check not only the data they have provided for accuracy and completeness, but also the researcher's interpretations for its 'fit' or faithfulness to their own experiences or thinking. Titchen's and Binnie's concerns are representative of those of many post-positivist action researchers who attempt to circumvent the problem of transcription versus invention, by faithfully triangulating and checking the relationship between their research accounts and something outside of that account. However, these attempts to validate the data all seem to suggest that the search for certainty in one's research continues to dominate the thoughts of the researcher. As I have described in relation to the crisis of representation, such manoeuvres do not fully reconcile the transcription-invention dualism or guarantee greater certainty. All research texts include degrees of invention, all are partial and constructed, and researchers report and recall only that which holds value to them, so that none can claim absolute certainty.



According to Denzin (1998), while there is no consensus as to what the post-positivist criteria should be, most suggestions appear to reflect continuing and underlying positivistic criteria. However, where there is a distinction from positivistic concerns, this tends to be related to the degrees of generalisation sought. That is, post-positivist qualitative research is frequently concerned with 'internal' generalisations, i.e., their findings are valid within a sample such as a localised culture. In contrast, positivistic research, as suggested, attempts to deal with both 'internal and 'external' generalisations, using the terminology 'internal validity' and 'external validity' respectively, which it is supposed allows broader generalisations (Maxwell, 1992). This of course assumes that research findings might be judged valid or true in relation to their degree of generalisability. Although the findings may be related to that to which it is applied, it may not of course accurately describe single phenomena (Winter, 2000).

With regard to the postmodern paradigm, as I have described above, the concept of an objective reality, against which to validate knowledge, has been questioned. Postmodernity challenges the conception of knowledge as a mirror of reality and of there being a correspondent understanding of knowledge with reality. Postmodernity argues that knowledge is not primarily a matter of interaction with a non-human reality, but rather of communication between persons, so that all research into the experience of people must expect to inevitably encounter conflicting and contradictory accounts and recognise the inevitable presence of opposing truths.

Regarding this social and linguistic construction of knowledge, the problems of interpretation frequently lead to knowledge being 'validated' through, although not solely by, practice. Indeed, I have also drawn upon this concept of validity in this thesis by describing, as in Chapter III, details of the developmental aspects of my practice-research endeavour, and of how my practice contributed towards the successful development of the Engela Portage Programme. Also, throughout this thesis as a whole, I have tried to reveal the processes by which I reflectively and reflexively theorised my practice and the Engela Portage Programme's development, and the enactive relationship between the two as part of a dialectic analysis. In so doing, I have relied upon and included social constructional ideas and second-order systemic theories, and made reference to many other authors to both 'validate' and to extend my own ideas. This



understanding of dynamic social and linguistic legitimisation seemed to be understood by Winter (1998b, p. 67) who claimed that:

“if thinking is crucially a matter of finding an individual voice it is also about understanding oneself in relation to the cultural traditions within which one finds oneself; it involves, therefore, thinking in dialogue with others”.

However, within the current crises of legitimisation, the dilemma remains how to demonstrate the legitimacy of research to the academic establishment, if the positivistic epistemology is rejected. That is, how are we to justify a very distinct means of self-understanding which forms the basis of postmodern aligned research to a readership which might hold to a different self-understanding? (Siraj-Blatchford, 1994).

Indeed, in the course of deconstructing the notion of validity some postmodern researchers have even argued that we need to dispense with the concept altogether, while also recognising that some kind of qualifying and evaluation for their research remains necessary. Consequently, many alternative means of judging research have been put forward.

For example, Guba and Lincoln (1987) suggested the use of the alternative term ‘credibility’, in which a credible study would be one which provided faithful descriptions and which deliberately focused upon how the researcher influenced and was influenced by the subject. They coupled this term with a further notion of ‘auditability’, which they suggested would allow another researcher to clearly follow the ‘decision train’ used by the initial researcher. Similarly, Hall and Stevens (1991) put forward the concept of research ‘dependability’ to describe the process which might be used to establish whether research findings were credible. Reason (1991) also claimed that the term validity was too ideologically laden and suggested the use of the less value laden term ‘quality’, which he argued allowed more space for researchers to reformulate new standards of research and to draw upon widely different fields of thought. Likewise, Atkinson and Heath (1991) were similarly unhappy with the term validity and preferred the use of the term ‘trustworthiness’. However, reference to validity persists in many contemporary social and educational research texts, although it would seem that many postmodern and new paradigm researchers remain haunted by, and do battle with, the concept of ‘validity’ (e.g. Lather, 1994).



In general, most postmodern ideas of validity, in which knowledge as pure observation is rejected, emphasise how truth is ultimately constructed through conversation and interaction. Dialogue therefore assumes importance and valid knowledge claims are arrived at through the course of conflicting interpretations and negotiations among the members of a community. As Lather (1994, p. 38) pointed out, postmodernism argues that the ‘thing’ researched itself, in its absence, can never be witnessed and that postmodern notions of validity, “are all concerns that decenter validity as being about epistemological guarantees. Such postepistemic concerns reframe validity as multiple, partial, endlessly deferred”.

As a consequence Kvale (1995) suggested that, within postmodern aligned research, the old tension and dichotomy between observation of the facts and interpretation of meaning had been replaced by one of a tension between interpretation and action, in which aesthetics and ethics are significant.

“When knowledge is no longer the mere reflection of some objective reality, but the construction of a social reality, the beauty and the use value of the constructed knowledge comes into the foreground. We may here draw an analogy to architecture - it is essential that the foundations and the frame of a house is solid and stable, but if there is no beauty in the architecture, or utility of the design, the house has no value” (Kvale, 1995, p. 26).

Indeed, as Siraj-Blatchford (1994, p. 18, original emphasis) also pointed out, the words “valid” and “value” shared the same etymological source, and that:

“the researcher’s assessments of validity are based on their perceptions of ‘worth’ and hence upon their value systems. In clarifying their rationale, the case study researcher is delegating this responsibility to the reader who may accept or reject her explicit values. Quantitative researchers, by contrast, often present their findings as objective truth and hence *smuggle* their values in”.

Denzin (1998 p. 9) also asserted that the postmodern undermining of the claims of research texts to any external authority, leads to the conclusion that “every text must be taken on its own terms” so that, “values and politics, not objective epistemology govern science”. In this sense, a ‘valid’ text is one that exposes political and ideological commitments and the taken-for-granted discourses, which shape the nature of the interactions and understandings of researchers. Furthermore, Denzin (1998) suggested



that a text will also be judged by its 'verisimilitude', its textual appearance of truth, within the particular community in which it is presented and which challenges it. This concept of verisimilitude seems similar to the idea of communicative competence I shall refer to below.

Concerning the diversity of the counter practices of legitimisation raised by postmodernity, as might also be expected an overarching concept is that of reflexivity. Calls for reflexivity within report writing regarding research and practice are a central theme of postmodern understandings of 'validity' (Clarke et al., 1993).

Following Kvale (1995), within postmodern texts, 'validity' also frequently appears to relate to questions regarding: the representation of research, such as its 'craftsmanship' and credibility; the communicative competence of the research writing; and the overall pragmatic purposes of the research and the appropriateness, ethically and pragmatically, of the research processes involved to bringing about change.

### *Craftsmanship*

Kvale (1995) argued that the apparent craftsmanship of research was important in determining whether other researchers would find the research findings credible and make use of them, and that the concept of craftsmanship referred to whether the research study investigated the phenomena intended to be investigated. This seems to tally with Guba and Lincoln's (1998) claim that a key question for research validity was not 'Is it true?' but whether it was believed to increase our understanding. Implicated here is also how the researcher as a person is perceived by the research community, their past achievements and their assumed ethical integrity.

### *Communicative Competence*

Given the shifting grounds upon which validity will always be judged, for Siraj-Blatchford (1994) validity was also ultimately dependent upon the 'communicative competence' of the researcher. This notion seems similar to that proposed by Usher et al. (1997) regarding the researcher's need to create a convincing narrative. That is, validity might be essentially understood also as, "the production of a 'rigorous' text - one which works within the community of readers to which it is offered and is attuned to the habitus of its audience" (p. 215), although they caution that as the readers of the text may



not interpret it in the manner in which the researcher intended, “the validity of research is always open to question” (p. 215). This understanding of validity highlights the challenges to any research narrative by the process of its socially constructed legitimisation, a process which may extend beyond the researcher’s professional peers, to include the subjects of the research text. Although Kvale (1995, p. 31 ) warned:

“A heavy reliance on intersubjective validation may, however, also imply a lack of work on the part of the researcher, and a lack of confidence in his or her interpretations, with an unwillingness to take responsibility for the interpretations. There may be a general populist trend when leaving the validation of interpretations to the readers, as by reader response validation, with an abdication to the ideology of a consumer society: “The customer is always right.””.

### Pragmatic Validity

Many contemporary new paradigm researchers have also attempted to pragmatically validate their research findings, such as through establishing the degree of usefulness of the knowledge generated and its ability to improve their practice (Elliott, 1991). This approach to knowledge validation seems similar to Lather’s (1986) notion of ‘catalytic validity’. Catalytic validity is conceived as the capacity of the research process to bring about change and to impact on the participants’ knowledge of their reality and to spur them towards some self-determined action. So, it is argued, the extent to which research is able to bring about the desired state of affairs may add to its sense of validity.

According to Kvale (1995), pragmatic validation is based upon the assumption that ‘knowledge’ is essentially ‘action’. Consequently, action research approaches in particular, which are usually less interested in simply description but more with practice, frequently privilege an understanding of validity in terms of the effectiveness of their research. Pragmatic outcomes can, of course, be various, ranging from successful problem-solving, the empowerment of specific groups, to enhancing the researcher’s personal understanding, and as in my claim to validity that my own practice-research endeavour enhanced my learning and understanding and led to the development of an ‘effective’ programme. Kvale (1995, p. 35) also noted that, while a communicative understanding of validity included an aesthetic dimension, pragmatic validity was related to ethical considerations as a pragmatic approach assigns truth to, “whatever assists us to take actions that produce the desired results. Deciding what are the desired results involves values and ethics”. Similarly, Siraj-Blatchford, (1994, p. 56) claimed that:



“While no individual researcher has privileged access to the ‘truth’, clearly defined ‘standpoints’ may provide parameters within which progress can be made and validity assessed, in part, according to the reflexively identified ‘location’ of the researcher”.

This notion of stand-point validity relates the outcomes of the research in terms of how it operationalised or achieved change in line with the particular values and ethics of the researcher. Reason (1991) also saw the notion of ‘truth’ in research as being related to, ‘somehow getting it right’, while recognising that there was probably more than one ‘right’ route and that notions of right would be tied to the researcher’s and the wider community’s views of values and ethics. This returns us to the understanding of praxis described above. The above arguments would imply that praxis as informed, committed action implemented to bring about positive and valued change, through a reflective and reflexive questioning of the taken-for-granted, can, from a postmodern stance, potentially and pragmatically provide a systematic testing of the ‘validity’ of knowledge and the practice-research process as a whole. Kvale (1995) also argued that the inclusion of ethical action within social research shifted its emphasis from simply interpreting the social world, to understanding research as a means of pragmatically effecting change and transforming that world in line with espoused values and aspirations.

This idea of validity being understood in terms of change and challenge was also recognised by Lather (1994). Lather (1994, p. 37) argued that fundamentally validity was also a concept that was, “a limit question of research, one that repeatedly resurfaces, one that can neither be avoided nor resolved”. Lather attempted to re-conceptualise validity in anti-foundational terms as, “an incitement to discourse...To shift our sense of the real to “discourses of the real” is to foreground how discourse worlds the world” (pp 37 - 38). For Lather (1994), postmodern research also needed to shift from a ‘validity of correspondence’ to a ‘validity of transgression’, which would push and challenge the boundaries of accepted, legitimate understanding and thereby, as a concept, validity would inevitably always be problematical. That is, questions of research and practice in terms of establishing a measure of validity should ask to what degree the research, as well as the knowledge it produces, enables us to free ourselves and to transgress from orthodox constraints so that, “new practices are emerging that reshape our sense of the possibilities of what we do in the name of the human sciences” (Lather, 1994, p. 329).



Lather's arguments also appear to reflect Feyerabend's (1978, p. 29, original emphasis) belief that:

“Standards which are intellectual measuring instruments often have to be *invented*, to make sense of new historical situations just as measuring instruments have constantly to be invented to make sense of new physical situations”.

And that conversely “the validity, usefulness, adequacy of popular standards can only be tested by research that violates them” (Feyerabend, 1978, p. 35). This view also echoes that of Polanyi (1960, p. 54) who claimed that “the professional standards of science must impose a framework of discipline and at the same time encourage rebellion against it”.

Winter (2000) also asserted how our understanding of validity needed to shift with the nature of the questions asked and the particular context of the practice-research. Winter argued that the construction of validity typologies, in which validity was understood as categorised into different types, such as those outlined above, were effectively meaningless as there are so many diverse and multiple forms of ‘truth’ and ‘validity’. Furthermore, according to Winter (2000), as validity is essentially understood as a concept from positivism, it is frequently inappropriate to social and educational research, where the proper concern might include questions about power, adequacy and accountability. As Winter (2000, no page number) maintained:

“Whether or not validity is essentially the same concept in qualitative and quantitative research, it would seem evident that the means by which this is to be achieved are different for each methodology. However, these means could also be viewed as means to different ends and means to different ‘truths’....each different truth inevitably requires different means of validation. It is the means of validation that should be adjusted depending on the kind of truth that is sought or expected”.

He continued, that:

“Therefore, it would seem that ‘validity’ relates to the correlation of research methods and the purposes of the research, rather than any universal or standardised test or procedure”.

In summary, it can be argued that postmodern questions regarding the value and degree of ‘validity’ of practice-research call for very different and challenging ways of



understanding research than has been conventionally understood. Yet, as with traditional understandings of validity, these more contemporary ideas also furnish researchers and practitioners with implements for action. Each understanding can be used to justify various means to judge or evaluate policies and practices, to define oneself as a practice-researcher, and so forth. While in the traditional modernist context, there is generally less open and deliberate concern for moral, aesthetic, ethical and political evaluation of research practice, within the postmodern context, emphasis is placed on the pragmatics of language, so that research and practice can no longer be extricated from these dimensions of the debate. Postmodernity calls for practice-research to openly acknowledge that it is part of a wider socio-political and discursive context, that operates to the benefit of certain interests and forms of cultural life and to the detriment of others.

From the description of contemporary attempts to understand how postmodern practice-research might be judged, it appears that while the question of establishing the validity of such research remains unresolved, postmodern understandings have generated a pertinent series of questions against which researcher's might consider their practice-research. These questions include: whether the practice-research text reflexively reveals partialities and the power struggles inherent in its claims; whether the practice-research has any pragmatic value, such as in assisting the improvement of practice and the furthering of knowledge; how the practice-research stands in relation to values of 'improvement' and ethics; and whether the research text communicates effectively and in an aesthetic narrative style which renders it acceptable to the wider readership. I have tried to remain mindful to these questions in my drafting of this research text. As Winter (2000) argued, I also recognise that ultimately these 'validity' questions and the concept of validity generally are not something which can be simply addressed at the end of a research report. Rather, the question of validity, or whatever phrase we use to describe the worthiness of our practice-research, is inevitably a consequence of the whole research process itself, being implicit throughout the practice-research and its subsequent reporting.

#### **2.5.7. A Methodology Emerges**

Within the introduction to this chapter, I set one of its aims to be a description of the course of my own learning regarding the shifting understanding of a range of practice and research issues, as a means to locate my own practice-research within a



methodology. As I hope I have begun to illustrate in this chapter already, this has proven to be an important learning experience and essentially part of my ongoing professional and educational development. In terms of that development, my own particular search to understand my expert practice experiences and a means in which to methodologically frame them, and so present them to the reader, has led me across epistemologies, through interpretative paradigms and on towards new paradigm research methodologies and beyond. In the course of that search, I have read a wide range of literature related to qualitative approaches to research and with a particular focus upon action research and reflective practice. Perhaps it could not be expected to have been otherwise, but it has taken me some time to grasp that it was this very search for a methodology, for a means to locate and so represent my own understanding and ideas about expert practice, coupled with my present and earlier expert practice, that actually represented my own practice-research methodology. Indeed it is a dynamic methodology, one which is continuing to unfold and which remains incomplete and is likely to remain so, with this thesis representing the most recent stage of that methodological journey. Usher et al. (1997, p. 213) seemed to capture the nature of my own methodology in their description of research as, “a process of coming to understand and to make claims about what one has discovered” which, they added, is only possible following a reflective and reflexive analysis of pre-understanding.

It has been through the course of developing my own brand of individual action research, or what might more simply be described as my reflective practice as I shall now describe in the following section, that I have come to construct my own developing theories and ideas about my expert practice, as I have reflected and then re-reflected upon my previous experiences and understandings in the light of my unfolding experience-learning. This has allowed me to further conceptualise and develop my understanding, that is my personal epistemology, regarding my own expert practice and to associate this with an epistemology of practice and the methodology of individually orientated action research.

As such, I also see this thesis as part of the much wider and emerging range of research methodologies stimulated by postmodernism and social constructionism in particular, which aims to construct new ways of knowing. Like Lather, I can vouch that it is through embracing these different ways of practising and researching that, as experts, we



might, “generate ways of knowing that can take us beyond ourselves” (Lather, 1991, p. 153) and which also encourage us to question the taken-for-granted, without which, “we cannot claim to know what we [as educational researchers and expert practitioners] are doing” (Morris, 1972, quoted in Carr, 1997, p. 203, insertion added).

## **2.6. Framing My Practice-Research Within A ‘New Paradigm’ Action Research Methodology**

I have earlier suggested that my research can be broadly conceptualised as being located within an action research methodology. Also, within the previous section, I detailed both the search for that methodology and, in so doing, sought to illustrate the methodology itself. I have framed my own personal methodology within action-research and I have done so self-consciously. I realise that, by aligning myself to the methodology, I am also effectively claiming allegiance to an increasingly legitimate interpretative framework within educational research, one that will provide both a means by which I can gain some authority and power in my thesis and by which the reader might also gauge its credibility and validity. That is, as Elliott (1990) implied, action research may provide a means of validating case studies, of which my practice-research related to my experiences within Namibia and subsequent shifts in understanding might be considered.

Within this section of the chapter, I aim to provide an overview of the rise of action research generally as a means of inquiry and, in so doing, help the reader to understand why I have chosen to locate my practice-research broadly within this methodology. I will outline some of the differences between the ways in which action research as a methodology has developed and diversified, and will include a description of more contemporary or what has been termed new paradigm action research. By this means, I will attempt to also draw out my own understanding, so as to help the reader more thoroughly understand the conceptual position of my own individual practice-research methodology.

Following a general discussion of action research and new paradigm action research, I then aim to specifically locate my practice-research within an individually-orientated action research paradigm, that is to consider how my work represents my own professional research trajectory. Importantly, I want to highlight how I have come to understand action research as a dynamic epistemological alternative to the traditional



positivist and post-positivist methodologies, and not as a technical method, as it sometimes seems to be understood, even within some quarters of the action research literature.

### **2.6.1. The Rise of Action Research**

Action research does not represent a unified field and the term appears to describe a wide range of research practices (McKernan, 1991; Noffke, 1997). However understood, action research in all its guises has become increasingly popular as a research methodology in the fields of education and health research, both as a means of either resolving or narrowing the supposed practice and theory gap, and also as a means of empowering professionals, by providing a route to bring about change in their practice and lives (Webb, 1989; Stringer, 1996).

While the term ‘action’ may suggest that action research’s roots are very contemporary, its beginnings are usually traced to America in the 1940s, and the work of the social psychologist Kurt Lewin (Adelman, 1993). With the re-emergence of action research within the United Kingdom in the 1970s and 1980s, and with regard to education in particular, authors such as Stenhouse (1981) began to envisage action research as being conducted not primarily by an academic researcher, as Lewin had conceived, but by those who had typically previously been the subjects of research, such as teachers. Since Lewin’s ideas of action research were initially proposed, the understandings of action research and the various changes in definitions of action research seem to have reflected different underlying philosophies and researcher paradigms. For example, McNiff (1993) described how the understandings of action research had evolved from Lewin’s earlier positivistic and functionalist approach, through to a post-positivist, descriptive and interpretative tradition. I will describe below how, more recently, action research has been embraced by researchers aligned to emancipatory, collaborative and postmodern perspectives, that is, with the ‘new paradigm’ perspective.

Although there appears to be no general consensus as to what action research is, the various definitions encountered within the literature usually include some common threads. These include its essentially practical and problem-solving nature; a focus on concrete problems located in the immediate context; the ongoing nature of the research over a period of time, sometimes of several years; which is constantly monitored and



reviewed through the use of a variety of methods and means; with ‘feed-back’ which leads to some modification, adjustments or changes in direction; all of which are in the pursuit of improvement in knowledge and or/practice or conditions.

### **2.6.2. New Paradigm ‘Action Research’**

“so-called ‘new paradigm’ research in the educational field - of which action research, collaborative research and participatory research can be considered examples - represents a practical change in the conduct of research and a potential liberation from the technical-rational model which scripts both investigators and their subjects in restrictive ways” (Usher et al., 1997 p. 212).

In general, new paradigm approaches understand research as not simply a practice that leads to theoretical construction, but also acknowledge the inextricability of the link between research and action. Indeed, experiential learning is viewed as a central element in the research process, rather than simply incidental to the collecting of findings and data. Consequently, new paradigm research is usually understood as a form of research in which the researcher is interested in the particular, the personal or local knowledges, so that the understanding of knowledge is reconsidered as experientially-based and framed in terms of its pragmatic worth, how it assists in achieving valued goals and also how it might help to improve or to inform practice (Reason and Rowan, 1981; Reason, 1988; Meyer, 1993).

Prior to the advent of new paradigm research, research rarely considered the reflexivity of researchers as an issue or of the development of knowledge through dialogue (Usher et al., 1997). Consequently, these new research perspectives and contemporary understandings of action research have tended to focus upon issues such as the various roles of practitioner-researchers within the research process, the significance of reflective thinking, praxis and the development of critical stances, through the empowerment of practitioners. Indeed, praxis, as I have mentioned above, has recently become a key concept in the new paradigm understandings of action research (Lather, 1985), so that new paradigm action research is understood as a form of research which practitioners may undertake *simultaneously* with their everyday practice. As I also described above in relation to shifting definitions of research, in this broadened conception of research, research is viewed as an educational encounter, a process of learning and, in the field of professional education, it is increasingly being used as such. Furthermore, within the



new paradigm, action research and allied research approaches, such as co-operative and participatory research, are being advanced as means by which both individuals, particularly professionals, and groups may learn and develop, so that 'transformation' has also become a key new paradigm phrase.

New paradigm understandings of action research, by encouraging researchers to begin to reflexively examine their own presuppositions regarding their practice-research also acknowledge the socially constructed nature of knowledge. Moreover, new paradigm understandings usually imply that this form of practice-research embraces a process similar to Schön's (1991) idea of reflection-in-action. That is, action research entails a form of 'professional artistry' on the part of the practitioner-research, or the 'reflective practitioner', as they attempt to improve the quality of their thinking enactively in the course of their practice. Ideas of quality likewise include a questioning of the practitioner's values which are driving the research and supplying purpose to their practice and so identify an ethical dimension to the practice-research endeavour. As Whitehead (1999) argued, such an understanding of action research recognises values as living standards of practice and judgement which are implicit to our practical, professional lives.

This continual development in the understanding of action research, and the emphasis upon reflexivity, reflective practice and ethical commitment, has even led some authors to explicitly distinguish themselves from earlier understandings of action research by arguing for the use of new terms. For example, Reed and Proctor, (1995) refer to 'practitioner research' while Winter (1989) uses the term 'practitioner action research'. These distinctions between 'old paradigm', or post-positivist action research, and new paradigm practitioner research might be seen as further examples of the discursive manoeuvring within the research community. Jennifer Gore's (1991, p. 47 ) comments seem pertinent as she argued that although:

"'action research', as understood in teacher education circles, connotes specific practices. Given the wide range of practices that go by that name, however, it is clear that the term has no meaning outside its construction in particular discourses.....rhetorical attempts to reserve the label for a particular set of practices...are predestined to fail, functioning instead to police discursive boundaries".



However, I shall use the terms ‘new paradigm action research’, ‘practitioner research’ and ‘practitioner action research’ synonymously in this chapter. Nevertheless, this call to distinguish what has been referred to as practitioner research from action research does again highlight further emerging concerns of practitioners within both education and health. It helps to identify how traditional notions of research, including post-positivist action research, are seen by practitioners as too limiting and frequently inappropriate to both the study of their own working contexts and most significantly for stimulating improved work practices. The implication is that, although ‘old paradigm’ action research has ostensibly been concerned with professional practice issues, it has failed to adequately address the needs of practitioners. In part this has been attributed to action research being dominated by ‘outsiders’ (usually academics) who, it is claimed, have managed and so directed the research towards a prime interest in theory construction and propositional knowledge (Gore and Zeichner, 1995), rather than practice and dialectic and experiential knowledge. New paradigm practitioner researchers have therefore questioned traditional action research, both in terms of its underlying philosophy as well as the generally accepted format associated with the writing and communicating of such research. In contrast, practitioner research particularly acknowledges the personal and idiosyncratic insights gained within the research process and the significance of culture and political beliefs in affecting the manner in which the researcher conceptualises the world. Indeed, as I have suggested, such personal values are seen as having a primary role in determining both the questions asked by the researcher and the specific method of the inquiry. For example, Winter (1989, p. 4, original emphasis ) claimed that:

“Practitioner action research is thus part of the general idea of professionalism, an *extension* of professional work, not an *addition* to it thus points to a form of learning which is an intrinsic outcome of professional experience, and to a form of involvement with practical experience which is intrinsically *educational*”.

Reed and Proctor (1995) also argued that practitioner research differed from more traditional research paradigms, including post-positivist action research, in regard to three key issues.

Firstly, they considered the nature of the relationship between the researcher and the researched. According to Reed and Proctor (1995), unlike traditional research, the key distinguishing feature of practitioner research is that it is research undertaken by



practitioners in their own field - i.e. by 'insiders'. Reed and Proctor (1995) explored this notion of 'insider versus outsider' researcher status and seemed to suggest two key factors for determining the degree of 'insiderness'. They identify 'workplace' as significant and indicated that working within the context into which one is researching is a characteristic of insider research. Additionally, they claimed that 'familiarity' with professional practice is related largely to an insider research position, with the outsider being conceptualised more as a 'visitor'.

Secondly, Reed and Proctor (1995) referred to the relationship between the researcher and the 'data' collected as a further distinguishing feature of practitioner research. Inherent in the notion of the 'insider' is the question over the source of the motivation for the research and the purposes to which the research findings are put. They claim that the strength of 'insider' practitioner research is that insiders are more likely than 'outsiders' to be motivated by and interested in improving their own knowledge and practice, and so less distracted by concerns that the research conforms to traditional academic parameters, which they believe may compromise or detract from the utility of the research to directly inform practice issues. For practitioners:

"the primary aim.....is usually to solve a critical problem or to develop an understanding about the nature of practice, and ultimately to contribute to the body of professional knowledge" (Reed and Proctor, 1995, p. 11).

It is particularly this emphasis on improvement of practice and the development of practitioner knowledge that, according to Reed and Proctor (1995), most distinguishes, methodologically, practitioner research from earlier understandings of action research. It is argued that practitioner research does not aspire to be divorced from the intrigues and complexities of professional life, social behaviour and practice, but aims to be a central and relevant part of it and to generate local knowledges specific to the context.

Such a relationship between the researcher and the information collected is likely to be significantly influenced by the 'insider's' familiarity and prior knowledge of the research context. According to Reed and Proctor (1995) 'insiders', in the course of their practice, might be expected frequently to have to make decisions based upon incomplete knowledge and their own personal beliefs and values as their practice unfolds. In such circumstances, clinical and professional judgements may have to inevitably be made



when the information or 'data' available is only partial, and even occasionally conflicting, so that it cannot be tried and validated experimentally, as might be expected within a more traditional research design. Neither can practitioner researchers necessarily, "‘prove’ what they know through experience: this has to be taken on trust...which often cannot be articulated in ways that conform to traditional research proposals" (Reed and Proctor, 1995, p. 15). Practitioner research, therefore, acknowledges the crucially personalised aspect of such research, a topic to which I shall return below.

It also seems that, in privileging practice, this understanding of practitioner research represents some, but not all, of the contemporary tensions in social and educational research generally, in which research interests are shifting away from a concern with knowledge for its own sake towards issues of performativity (Usher and Solomon, 1998) and of pragmatics, as I have described above in relation to validity. According to Usher and Solomon (1998), the contemporary concept of performativity switches the concern of research, and the measures by which it is judged, to an interest in the degree to which research is able to contribute to the best efficiency and effectiveness. Usher and Solomon (1998, no page number) claimed that, as the status of knowledge shifts, as it becomes decentred, so too does the understanding of how knowledge might be produced, that is the practices of research, so that educational research is now, "less answerable to its own research paradigms and communities". Again, in line with Reed's and Proctor's (1995) concept of practitioner research, the apparent performativity of this type of educational research serves to further undermine researchers' traditional claims to be 'impartial', as it strives to achieve higher levels of relevance and utility.

This performative understanding of the purposes of new paradigm action research and its broadened definition in which, in some cases, it equates to the ideal of praxis, also includes the notion of practitioners explaining to themselves reflexively how and why their practice has developed as it has, so that this might subsequently enable others to share this knowledge (McNiff, 1988). The demand for performativity, and the subverting of what is understood to be knowledge, also seems to have contributed to the postmodern methodological unruliness, by questioning the very notion of knowledge as something that has to be validated by a scientific epistemology, thus further undermining traditional positivistic forms of knowledge production. However, according to McNiff



(1988) contemporary understandings of action research might still be considered 'scientific' if one understood science as, "principled action based on rational thought" (p. 124).

Where the understanding of practitioner research appears to differ significantly from research purely associated with performance, is that in the former the *process* of the research is also considered vitally important. Who contributes and how, with a focus upon degrees of collaboration, representation and reflexivity and inclusiveness, egalitarianism and empowerment, are usually the aspirations and substance of educational and health practitioner research.

### **2.6.3. The Systematic Nature Of Action Research**

Frequently the literature related to action research refers to it as consisting of a series of stages, steps or cycles. McNiff (1988) described how Kurt Lewin envisaged action research as beginning with the first stage, in which the general idea of what the research problem might be is considered and examined in relation to the means available to resolve the problem. A decision may then be taken regarding the next action step, which in turn may lead to a modification of the original idea. The first step is then evaluated and the process repeated in a cycle of planning, action and fact-finding. The revival of action research within the United Kingdom in the 1970s was also accompanied by a reconfiguration of Lewin's concept of action stages. For example, Kemmis and McTaggart (1988) refined the earlier notions of steps, by proposing that action research typically followed the cycle of: reflection on a theme; planning for action; taking action; observation and evaluation; further reflecting on the theme; further planning for action; and so on. In this way, Kemmis and McTaggart saw action research as forming the basis of a problem-solving strategy.

However, this concern with the details of action research steps or cycles has led to some criticism, with McNiff (1988) for example, arguing that such notions portrayed the research approach in too rigid and linear a manner. McNiff (1988) claimed that the tidy notion of logical action steps did not adequately reflect the complex reality that teachers, would-be action researchers, frequently had to contend with within their workplaces, and to which any adequate research approach would have to be able to respond. McNiff (1988) thought that formal and rigid definitions of action research were also



inappropriately prescriptive and thereby effectively curtailed the spontaneity and creativity that usually occurred in practice. According to McNiff (1988) formal models of action research also tended to be too concerned with observation and description, rather than explanation, and consequently they were not educational in themselves. Rather, McNiff (1988), building upon the ideas of Whitehead (1985), argued for practitioners to develop their own personal 'theories' based upon their practice, so that research might include a more self-generative capacity, that is, be understood as 'generative action research'.

In contrast to more formal action research models, McNiff (1988, 1993) therefore proposed that a new paradigm understanding of action research might be conceptualised as consisting of action-reflection 'spin-off' spirals, through which the researcher would be able to deal with a number of problems simultaneously. McNiff (1993) believed that this would reflect the reality of researchers initially pursuing a particular problem, which she claimed frequently led researchers into discovering that the problem was simply symptomatic of several underlying problems. McNiff (1993) also suggested that such problem-solving spirals could form the basis for the self-improvement of practitioners. She proposed that this self-improvement might be conceptualised as a series of personal statements, such as; I experience a problem when some of my educational values are denied in practice; I imagine a solution; I act in the direction of the solution (implement imagined solution); I evaluate the imagined solution (the outcomes of action); I modify my ideas and practices in the light of the evaluations. Clearly, McNiff's (1993) ideas acknowledge the importance of action research as a process of *individual* practitioners understanding *their own* practice.

For McNiff (1993) this new paradigm understanding of action research rested upon the use of the generative series of questions described above and to the subsequent answers which the researcher would share with colleagues within a dialectic process, through which ideas became 'metamorphosed forward' towards the improvement of practice and, thereby, also self-improvement. McNiff (1993) also believed that this series of personal statements and questions ensured that the inquiry remained relevant to the dynamic realities facing the practitioner and, similar to Whitehead (1997; 1999), that this assisted in the generation of personal theories which accounted for the practitioner's practice and the continual reflective process of change. Therefore McNiff acknowledged action



research as essentially, in the first instance, an individual endeavour primarily directed towards the improvement of the practitioner's professional practice, and the resolution of the personal contradiction that practitioners both aesthetically and emotionally feel, when their values are not adequately reflected in their present practices.

McNiff's views have not gone unchallenged. Winter (1989) conversely argued that more formal descriptions of the action research process (e.g. Kemmis and McTaggart, 1988; Elliott, 1991) were useful in guiding research, particularly for those new to research. However, Winter also acknowledged that there were positivistic strains in some of these more formal schemes of action research, as evident in the call to systematically collect facts, a diagnosis of the problem and the tendency to imply a positivistic understanding in the relationship between theory and practice. Nevertheless, Winter (1989) notably claimed that arguments surrounding the degree of structure of action research, its systematicity, were actually of less importance than the consideration given to the place of reflection-in-action within the process; that is the means by which researchers made sense of 'evidence' arising during the course of their action research. Indeed, Winter (1989) felt that an adequate acknowledgement of the role of both reflection and reflexivity in action research was crucially important, as it also helped to counter positivistic criticisms of action research being biased and anecdotal.

#### **2.6.4. Individual Orientated New Paradigm Action Research**

These described shifts in contemporary understandings of action research clearly define it as more than a commitment to a set of techniques, whether steps, circles or spirals, by which practitioners approach the problems of their practice. Rather, new paradigm action research appears to represent a commitment by practitioners to exploring the meanings of their professional lives and their practice possibilities, both of which have been central elements within my own practice-research. This entails a perpetual striving towards an understanding of the enactive relationships of practice and the means by which these might be represented, so as to assist one's own expert practice to improve and also other practitioners in their own practice-research endeavours. Given the complex dialectic nature of this process it is likely that our understandings of action research will remain diverse and changing, shunning closure, always open to contestation and spurred by transgression.



Reviewing the action research literature, I have been aware that one transgressive tendency, which I have associated with the increasingly popular pairing of the two phrases ‘practitioner’ and ‘research’ by several authors, has been the shift in the understanding of action research away from viewing it as an openly collaborative endeavour, such as when researchers work alongside practitioners, to one in which action research is also understood crucially as an individual research endeavour (Whitehead, 1989; Lomax et al., 1996a; Whitehead, 1999). I have been encouraged by this shift as again it seems to resonate with my own practice experiences, and so implies some support within the action research literature and thereby a means towards legitimising the particular methodological theme of my own thesis.

Concerning individual practitioners, Whitehead (1989) for example referred to how the tension created by practitioners, realising that their personal values are not represented within their current practice, can encourage them to undertake reflective research into that practice and in so doing begin the process of developing their own personal living educational theory, that is their own epistemology of practice; one which unfolds as they think and re-think their practice, to which I referred to above. As I understand Whitehead, this seems to be in the nature of a dialectic reflection, between thought and action, theory and practice which develop themselves mutually. Likewise, Day (1995, p. 363, emphasis added) referred to action research’s potential as a means of practitioner self-reflection undertaken, “in order to improve the rationality and justice of (a) *their own* social or educational practices, (b) *their* understanding of these practices and (c) the situations in which these practices are carried out”. Lytle and Cochran-Smith (1994) similarly understood educational practitioner research, such as that carried out within schools, as a means for practitioners to primarily understand and improve their expert practice and as a way for practitioners to know their own knowledge and thereby to make it explicit and problematic. In doing so, they also suggested that this provided practitioners with the skills and practical possibilities for critically reflecting upon their expert practice specifically and their profession generally.

In some quarters then, action research has been described as a form of self-study, in which individuals enquire into their practice for the purpose of both improving what they are doing and their understanding of what they are doing, as a form of self-managed improvement (Lomax, et al., 1996a). This seems to represent a further form of



performative understanding and knowledge, but one which also includes the notion of practitioners explaining to themselves reflexively how and why their practice has developed as it has, and in the process thereby subsequently enabling others to share this knowledge. Similarly, Usher et al. (1997 p. 218) referred to the notion of such action research as a, “dynamic personal trajectory of evolving understanding” along which, “individuals travel in order to meet their own requirements for understanding as well as attempting to satisfy transpersonal goals of enquiry” (p. 219). This metaphorical view, of individual action research as a journey, also encompasses the researcher’s self as a reflective practitioner who is developing their own understanding and clarifying personal questions about their practice. To this extent, Usher et al.’s (1997) ideas seem to concur with the concept of a ‘living educational theory’ and the epistemology of practice associated with Whitehead (1989, 1999), McNiff (1988, 1993) and Lomax and Parker (1996), with Whitehead (1989) asserting that educational theory itself can be created through the descriptions and explanations of individual practitioners, as they attempt to find an answer to questions of the kind, ‘How can I improve my practice?’

As with new paradigm action research in general, this form of individually orientated action research, as I came to appreciate in reflection upon my own expert practice, provides practitioners with opportunities to question the conventional, often taken-for-granted assumptions of their practice and encourages a re-thinking of how that practice might be improved. Usher et al. (1997) also recognised that attempting to represent such research was problematic, given the conventions of research writing. As a means towards resolving such difficulties, they proposed a dynamic framework for representing reflective action research, which has significantly influenced my understanding of the research endeavour and shaped the structure of this thesis. Their framework encompassing the dimensions of action research included a description of the systematic element, that is the technical and structural aspects of the research journey, coupled with a description of the experiential trajectory of the researcher. The experiential trajectory, they claimed, could be conceptualised as constituted by the relationship between the dispositional self of the researcher, such as their personal theories and tolerance for uncertainty, and the situational aspects of the research. These situational aspects reflect the enactive changes related to the necessary adaptive engagement of the researcher’s self with the social and material research context.



As I will describe in Chapter III, these situational or contextual factors also presented me with the reciprocal processes of learning that occurred between myself and my colleagues and others within Namibia. Usher et al. (1997) also suggested that the metaphor of the trajectory conveyed how the relationship between all of these elements changed over time, throughout the course of the research, and that its representation as such might assist the reader of the research text in following the reflexive, reflection-in-action story of the researcher, or at least the particular description of the action research experiences as portrayed in the text.

Furthermore, Usher et al. (1997, p. 220) claimed that this inclusion of an experiential view, in which such experiences are open to critical review, may also assist in providing a contextual validation of the research text by revealing, “the inherent situatedness of all understanding”. They summarised that the adoption of such a framework in which to describe an individual’s process of action research requires in, “the writing and learning about research....technical competence, contextual sensitivity and dispositional attentiveness” (p. 222), to all of which I have also tried to remain faithful within my writing of this thesis.

This wider inclusion of an enactive, reflexive and experiential element in the research text may go some way to addressing Elliott’s (1991) criticisms of the potential danger of individual action research, which he claimed could lead to a mere technical rationality due to an absence of reflexivity. Elliott argued that valid educational knowledge was most likely acquired through collaborative endeavour. However, Usher et al.’s (1997) structure, while individually orientated, does include a recognition of the wider social constructional aspects in the construction of the research narrative and its validation by the readership, as well as an awareness of the research process as inevitably a dynamic and enactive process. Furthermore, despite the fundamental social embeddedness of action research, the decision to undertake such research, as in my own case, must in the first place flow from a personal decision on the part of the practitioner, such as through a desire to improve their practice, and therefore as a means to develop their own personal knowledge of that practice.

Others have questioned not only the possibility of valid individual action research as self-study, but also the very premise that the roles of teacher and researcher, that is that a



practitioner's praxis, might equate to research at all. Hammersley (1993) considered the arguments that educational research should be integrated with the work of practitioners in the form of teacher-as-researcher. He claimed that, while the arguments that conventional research was less educationally relevant than research associated directly to practitioner experience had some validity, they were not conclusive and did not add up to a convincing case for the superiority of teaching-as-research. Indeed, his article concluded:

“My aim has been to counter the proposal that the roles of teacher and educational researcher should be integrated... In my view this is undesirable from the point of view of both research and teaching” (p. 441).

Similarly, Huberman (1996) questioned whether teacher-research was research, since, in his opinion, understanding events when one is a participant is extremely difficult, if not impossible. He suggested that if teacher-research could be considered research at all, then it had to be located within the ‘classic genre’ of interpretative research, and that accumulating and comparing teacher-researcher's finding would ensure that the research was “more honest”, provided that research safeguards were included to avoid “delusion and distortion” (p. 132).

However, the understanding of individual practitioner action research, as portrayed by Huberman (1996), Hammersley (1993) and indeed Elliott (1991), does not adequately reflect the ‘trajectory’ of the research process as Lomax, et al., (1996a), McNiff (1988, 1993), Usher et al. (1997) and Whitehead (1989, 1999) describe, nor does it concur with my own practice-research experiences within Namibia and in conducting my subsequent practice-research. While the inspiration for this form of individual action research is personal and geared towards the pursuit for personal practitioner knowledge, this process, as I have described, is fundamentally an enactive process shaped by the socio-cultural world in which the practitioner is embedded. Moreover, as in my own case, the process of re-thinking one's practice is importantly complemented by further academic research, so that new types of knowledge are produced and new understandings of professional improvement arise as practitioners engage with the literature and subsequently rethink and dynamically re-theorise their understandings. This returns us to the understanding, which I have described above, of the dialectic relationship between theory, informal theory and practice-research. The methodology of action research



associated with the epistemology of practice encourages practitioners to question the conventional assumption that it is only theory and knowledge derived solely from 'outside' that can lead to practice improvements, but rather that formal and informal theory, together with practice, can enrich each other. Viewed in these terms this is not the isolated, solipsistic venture that some critics of individual action research would imply.

Furthermore, as in my own practice-research experiences within Namibia, while I was inspired to question my expert practice, this desire sprung from my relationships with my colleagues and the families with whom we worked, so that the questioning of my taken-for-granted practices forced me to start to conceive of other worlds and other intentions. In this sense, individual action research might also be understood as ultimately always a collaborative endeavour, although we would need to acknowledge that there are varieties of 'collaboration'. In this way, individually orientated action-research, such as my own presented within this thesis, can also be seen a means of engaging practitioners in wider change initiatives related to their professions, as well as validating their theories in practice.

## **2.7. Summary Of Chapter II**

At the beginning of Chapter II, I set its central aims to be those of conceptually locating this thesis, so as to assist the reader in understanding how it should be read and indicating how my research might be positioned epistemologically and methodologically, all of which implicitly imply how it might also be judged or validated.

As I have also described, when I initially commenced both my practice-research and writing towards the construction of this thesis, I had been concerned with the question of whether my writing about my professional practice experiences and my changes in understanding, regarding both the Portage Programme and my own expertise genuinely represented research. Moreover, I had been concerned that my research should also be considered valid and that it produced worthwhile and original educational knowledge. As this chapter will attest, I have come to appreciate that what is or is not considered research, and its validity as research, depends upon the paradigmatic stance taken.



The postmodern paradigm, with which I have conceptually aligned this thesis, views both research and the product of research, knowledge, as socially constructed and discursively defined, so that there is an understanding of both as effectively indeterminate and constantly shifting. I have also argued that a postmodern understanding of research within education recasts it as not simply concerned with description or interpretation, but that, in postmodern terms, what counts as research is expanded to include research in ethical and action terms, that is, as a form of committed action towards positive change and improvement, including the wider processes and journey of individual 'experience-learning' related to the reflective and reflexive improvement of one's expert practice and understanding.

In these terms, a research methodology is not simply a way of expressing or representing one's research conclusions, but it is also, and I believe more importantly, a means of stimulating and developing one's thinking. As I have explained, my individual practice-research began the moment that I asked myself how I could improve the educational programme within the Engela Training Centre. It continued through the development of the Engela Portage Programme and became increasingly reflective and reflexive once I understood that I needed to change my own practice and to challenge my own ways of thinking, rather than simply considering technical aspects of improving the Programme and teaching my colleagues about Portage. This was the point at which I became a reflective practitioner. That reflective practice, my praxis, continued upon my return to the United Kingdom. I began to re-search into that reflective practice and encountered social constructional and postmodern concepts, and I was able to apply these to re-theorising my earlier understanding of my reflective practice within Africa and also simultaneously to the on-going process of my practice-research. This thesis therefore documents that personal research and seeks to provide a description and explanation of my own professional and educational development as an expert practitioner and my 'living educational theory' regarding that practice specifically in relation to the Portage Programme.

As I have also described, from my understanding of methodology related to this thesis, both my initial research question and the development of my research methodology are inseparable processes. I have also explained how I understand my methodology to importantly recognise that the 'self' of the researcher needs to be acknowledged as vital



to the research endeavour and how that endeavour is represented. Consequently, I believe that an important element in the research process is a description and an interrogation of the personal and contextual conditions underlying my research interests and how those interests were tackled and the further learning that occurred in the process. As such, I understand my research not as research in or on education, but educational research, as it is research that educates. These understandings have clearly influenced the manner in which this thesis has been constructed and my understanding of the status of the contribution to educational knowledge that I believe it makes. Consequently, I feel justified in having structured and written this thesis in general in a reflective, auto-ethnographic manner.

Within the following chapters, I have included descriptions of my experiences within Namibia, which called my earlier beliefs and understandings into question. I continue by describing and explaining the subsequent shifts in my understanding and learning, specifically about my expert practice and the Portage Programme's application in cross-cultural contexts and how in a more reflective analysis, spurred by my reading of social constructional literature, I was able to conceptually frame these ideas, drawing upon the language of systemic professional practice. The course of this search has proved to be a profoundly generative journey, which has led to new ideas and images and different ways of thinking about how to apply, understand and write about both the Portage Programme and my related expert practice.

I am aware that this present chapter is rather lengthy, but believe that this is justified, in that the conceptual issues which have been raised are also crucially pertinent to the understanding of expert practice and Portage programme development described in the later chapters. This is also to be expected, as I have argued above, because my understanding of reflective expert practice is that practice and research are intimately associated. However, I am also concerned that this thesis is not primarily understood or judged as one which is focused upon proving a particularly research methodology, or seen as principally a further contribution to educational research methodology. Rather, in the first instance, I understand my individual action-research to be a valid vehicle for conveying my personal theory, which is above all concerned with questions regarding the Portage Programme and associated expert practice.



Finally, as I have explained, the postmodern conceptual alignment of this thesis also has important implications for how it is judged. I am aware that for a practice or text to be accepted as research it must meet or be broadly within the parameters of the socially constructed understanding of those who are to judge it as research or not, including the personal views of the individual practitioner-researcher themselves. This depends ultimately upon the ability of the practitioner-researcher to convince others that their work constitutes research and the knowledge produced is worthy educational knowledge. Clearly, therefore I am also mindful that the crises brought about by postmodernism will have significant implications for how others will view and judge this thesis, including how its validity will be assessed as an original contribution to educational knowledge.

In part, I realise that this will also be determined through my ability to convey, to the reader of this thesis, my own rationality regarding research and practice. However, given the depth, range and character of the present contestations regarding what might or might not be defined as research and knowledge, I do not expect that the manner in which I position this thesis, or the ideas put forward, will necessarily be in sympathy with the beliefs and opinions on these issues of the reader. Nevertheless, my aim is to persuade the reader, through my writing and explanation, that there is indeed value and above all relevance in my educational ideas, and that the educational and professional processes I describe make sense and might be judged valid within the particular rationality of this thesis, as described above. This rationality, underpinned by an epistemology of practice, gravitates towards the reflexive, pragmatic and contextual notions of validity. I recognise that I need to also contextualise the knowledge claims that I am making, in order to communicate its value to the reader and I have endeavoured to achieve this throughout my description of my individual practice-research. Given the difficulties over questions of validity, I also hope to convince the reader that, while the understanding of validity within this thesis, based upon its conceptual location, may not accord with the reader's own, nonetheless it is possible to agree that there are many possible understandings of validity regarding research and knowledge, and that there is a reasonableness in Glyn Winter's assertion that "validity relates to the correlation of research methods and the purposes of the research, rather than any universal or standardised test or procedure" (Winter, 2000, no page number).



## **Chapter III**

### **The Development Of The Engela Portage Programme**

#### **3.1. Note To The Reader Regarding Chapter III**

I consider Chapter III to be an important chapter in this thesis as it describes and constructs my early experiential and technical practice-research trajectory during my stay within Namibia. Chapter III therefore has something of a phenomenological ‘flavour’ to it, in that it analyses and provides details to the reader of my life-world as a Portage practitioner. That is, within the chapter I consider the everyday world in which I practised, including my theories, interests and concerns which constituted my actions within that world. Chapter III therefore provides what Denzin (1989) referred to as “thick” description. My aim in including this level of description is not only that it will help to contextualise the claims to knowledge that I make within this thesis, but that it will also resonate with a Portage practitioner readership by referring to issues with which they are likely to be familiar, and thereby lend a further sense of ‘credibility’ to the first person, reflective narrative in which the chapter has been written.

However, I am also aware that to some readers, perhaps those whose primary interests are related to social constructionism or to other issues raised within this thesis, Chapter III may appear to be rather lengthy and descriptive and to these readers the ‘thick’ description of my practice may prove less relevant. Given that arriving at an understanding of the central themes of this thesis does not essentially depend upon reading Chapter III (although an understanding is, I believe, enriched by such a reading) some readers may wish to omit reading Chapter III and continue their reading from Chapter IV. For those readers who may not wish to read the chapter in its entirety, but who nevertheless may wish to sample the ‘essence’ of the narrative within the chapter, I would direct them to read section 3.5.4 ‘Conducting The Pilot Study’.

I would also like to explain to the reader my rationale for deciding what information to include and what to exclude from Chapter III. In making that judgement, as I have stated above, I was mindful of my desire to appeal to a Portage practitioner readership. Chapter III therefore might be described as a hybrid chapter integrating orthodox with less orthodox research details. For example, it includes some conventional research ‘data’



such as dates, details about the number of families worked with and the range of skills taught to children, etc. However, the text is clearly also unorthodox, especially when compared with the text of the majority of Portage research literature, in that it does not claim to represent a straight-forward transcription of events. That is, I make no attempt to claim any 'objective' facts and I have throughout made my subjectivity in reporting clear. Consequently, unlike more conventional research reports there is no 'absence presence' of the author (Usher et al, 1997). Rather, within Chapter III I have aimed to highlight the provisionality and constructed nature of my text. As such, I am acknowledging that it is a text which is always open to be re-interpreted and re-constructed and that as with all research text, including that of positivistic research, the link between lived experience and the text must be considered problematic and constructed.

Furthermore, when writing Chapter III I was also concerned to strike a balance between including sufficient orthodox research details to ensure that it appealed to a Portage practitioner readership, but to also ensure that these technical details did not 'hijack' the experiential narrative which I believe to be of greater importance to understanding the central themes of this thesis. Clearly, this is a judgement for which there is no set objective criteria and no doubt different readers will have different opinions as to whether I have 'tilted' the balance too far in either direction. Whatever, the contents of this chapter represent the product of my own best judgement as author of this thesis.

### **3.2. Introduction**

This chapter describes my involvement with the Engela Portage Programme within Namibia. My aim is that this description will help the reader perceive the significance of my experiences within that context, for my shifts in understanding regarding both my expert practice and the purpose of the Engela Portage Programme. I have therefore provided details of the situational experiences and circumstances that I believed enactively shaped and triggered my transformations in understanding and which marked an important change of direction in my professional development.

I am also mindful that the general first-order narrative style of this chapter might risk appearing to explain to the reader 'what' happened as if such an account is unproblematic in its reporting. While such first-order accounts provide a description of



the insights and learning that took place concerning the Engela Portage Programme and aspects of my management role, they also tend to readily convey a detached observer perspective. That is, first-order accounts, as illustrated in many programme development reports, tend to imply theory-free observation. As an attempt to counter this, I have also tried, after Lather (1989a), to ‘interrupt’ the text through the introduction of some reflective and reflexive commentary. However, I will explore these ‘second order’ systemic issues in greater detail within the later chapters of this thesis.

As I have referred to within Chapter II, my earlier professional training provided me with a number of practice frameworks, foremost among which was the approach known as the Four P’s (Faupel, 1986). The Four Ps describes a model of educational intervention under which professional action could be characterised by the sequential steps of Preparation, Planning, Performing and Post Mortem. These steps share much in common with those often associated with action research models in that they are intended to guide the expert systematically towards dealing with challenges and problems and subsequently to assist with the generation of rational solutions. Perhaps not surprisingly, given my professional training, my practice within Namibia can likewise be broadly conceptualised as a series of steps. I have therefore adopted the Four P’s as a means to organise this chapter into four main sections, as I believe that it both serves as a convenient and appropriate narrative framework in which to present the account of my involvement with the Engela Portage Programme as it unfolded chronologically, and also as it is one which at least holds true to the foundations of my own professional training.

### **3.3 A Chronology Of Events Detailed Within Chapter III**

**1992 March**

#### **Preparation Stage**

- I arrive at the Engela Training Centre (ETC).
- ‘Information gathering’ and ‘problem identification’.
- Development of assessment and teaching materials begins.



**1992 July****Planning Stage**

- Plans begin for the possible implementation of a Portage programme.
- Begin training of staff in Portage teaching approaches.

**1992 September**

- Special educational needs (SEN's) 'surveys' of the Engela area start. Parish offices targeted.

**1992 November**

- SEN's surveys extended to include local health clinics.

**1993 January**

- Pilot Portage programme begins with 8 families.

**1993 March****Performing Stage**

- End of pilot Portage programme.
- Engela Portage Programme launched. 8 families enrolled.

**1993 April**

- SEN survey at mission to the West of Engela takes place.

**1993 June**

- Engela Portage Programme supports 13 families.

**1994 January**

- SEN's surveys extended to include primary schools.

**1994 April**

- Funding sought to extend the Engela Portage Programme and to recruit an additional four Portage Visitors.

**1994 September**

- Engela Portage Programme now supporting 27 families.

**1994 August**

- Funding for extension of the Engela Portage Programme secured from donor.

**1994 November**

- Two new Portage Visitors appointed.

**1994 December**

- Training course for newly recruited Portage Visitors.

**1995 January**

- Engela Portage Programme begins to operate in new district.

**1995 February**

- Engela Portage Programme supports 48 families in total.

**1995 February****Post-Mortem Stage**

- My employment at ETC ends.

**1995 September**

- Independent evaluation of the Engela Portage Programme.
- Engela Portage Programme now employs six Portage Visitors with 50 families supported and a further 14 families waiting to join.



### **3.4. PREPARATION: Information Gathering And ‘Problem’ Identification**

#### **3.4.1. Background And Context Details**

My involvement with the Engela Portage Programme stemmed from my recruitment through Voluntary Service Overseas (VSO) to work with the Evangelical Lutheran Church In Namibia (ELCIN) as a volunteer educational psychologist. I arrived in Namibia in February of 1992, having previously in December 1991 received details from VSO concerning a request for my possible placement in a special education post in northern Namibia. Although the details that I received concerning the post were fairly sketchy, VSO confirmed that a local Namibian non-governmental organisation, ELCIN, had requested a volunteer with experience in special educational needs, to act as Head of the Department for People with Learning Difficulties at the Engela Training Centre, situated within the Engela mission in the northern region of Namibia, at that time referred to as Ovamboland.

Ovamboland was the colonial term used to describe the administrative region of what later became northern Namibia in which people from the Ovambo ethnic group live. Following national independence in 1990 under subsequent government reorganisation, Engela together with the two nearest ‘towns’ of Ondangwa and Oshakati became part of the Oshana electoral region, to which I shall later make reference.

#### **3.4.2. ELCIN And Engela - An Overview**

##### ***ELCIN’s Involvement With Disabled People***

ELCIN and the earlier established organisation, the Finnish Evangelical Lutheran Mission (FELM), have had a long tradition of rehabilitation work particularly in relation to people with hearing and visual difficulties (ELCIN, 1992). The Engela School for the Deaf and Blind was first established in the 1920s and continued to operate during and after the liberation war until 1991. Following independence in 1990 and with the availability of funding from the European Union, the Council of Churches in Namibia (CCN) and Oxfam UK, two new centres were built which became known as the ELCIN Rehabilitation Centre based at Oniipa and the Engela Training Centre. The ELCIN Rehabilitation Centre subsequently took over central ELCIN management responsibility for rehabilitation in the north of Namibia in 1990 and its responsibilities also included



managing the new Engela Training Centre rehabilitation facilities. Under reorganisation by the ELCIN Rehabilitation Centre, the new Engela Training Centre buildings which had originally been designed to provide a residential teaching facility for up to 40 people with “mental retardation”, came to replace the old Engela School for the Deaf and Blind.

### *The ELCIN Rehabilitation Centre*

Prior to arriving at Engela, I visited the ELCIN Rehabilitation Centre at Oniipa as part of a three day induction into the organisation as the Centre was viewed to be the hub of the wider ELCIN disability programme. During my induction period I was supplied with factual details concerning the scope of operation and organisational aims of ELCIN as a whole, the ELCIN Rehabilitation Centre and the Engela Training Centre as well as a description of the key personnel that I would be working alongside at the Engela Training Centre. In addition I was also quickly made aware of the relational complexities into which I had arrived all of which had some bearing upon how I was perceived by others and how my task of managing Department Three unfolded.

The expectation held by the staff of the ELCIN Rehabilitation Centre concerning my role within the Engela Training Centre was that I would help to reorganise Department Three that they saw as floundering. I was expected to begin by identifying the key problems and to subsequently suggest and implement an improved programme, based upon my experience of best practice within the United Kingdom. I was then to train the staff at the Engela Training Centre in the implementation and management of the programme so that it could then be operated and sustained independently.

I was also informed that future plans for rationalising the disability programme in the north of Namibia included handing the Engela Training Centre over to government control and funding as soon as this could be arranged. Consequently ELCIN's investment into the Engela Training Centre was to be limited, certainly in terms of capital investment, although the day to day running costs would continue to be met.

Concerning disability issues, it appeared that Community Based Rehabilitation (CBR) as envisaged by the World Health Organisation (Helander et al., 1989) was esteemed as the new, enlightened system for supporting people with disabilities and consequently this was the main focus of activity at the ELCIN Rehabilitation Centre.



### **3.4.3. Early Impressions Of The Engela Training Centre**

I arrived at Engela on 24<sup>th</sup> March 1992 and set my first priority as trying to determine more precisely both what was expected of me by my colleagues and what ideas I could construct about possible future plans for the Department I was to head. It was clear that the timing of my arrival at the Engela Training Centre, where I believed I was to work at least for the next few years, had not been expected by the Engela Training Centre staff. I was further disturbed to learn that even the senior Engela Training Centre staff had had no involvement in the decision or process that led to my recruitment as Head of Department Three. Consequently, I found myself in the uncomfortable position of explaining my presence, although this process was eased over the first few days, though not made any better, by an awareness that my Engela Training Centre colleagues were well accustomed to visits by a succession of consulting, innovation-bent Europeans. I later came to recognise that this lack of correspondence and consultation between the staff at the two ELCIN centres illustrated the wider social complexities within which I had to practice.

Clearly, these circumstances did not seem to bode well for the smooth establishment of the collaborative working relationship with my new colleagues that I recognised as essential following my own professional training and as indicated by research into similar project work in developing countries. For example, Havelock and Huberman (1977, p. 185), in a review of the problems associated with United Nations educational projects, noted that in relation to ‘experts’ that:

“The most unsatisfactory pattern of use of outside experts was one which placed them in commanding or initiating roles. In either case, once this happens it is difficult for nationals to develop the necessary involvement and sense of ownership”.

Despite the social tensions that I soon recognised would inevitably envelop and influence my professional involvement at the Engela Training Centre, I found that I was warmly welcomed by my colleagues. Indeed I was to constantly appreciate this sense of open inclusion which was extended to me throughout my stay.



At the time of my arrival the Engela Training Centre employed some eighteen staff including a Project Co-ordinator, a Secretary, two Heads of Department with teaching responsibilities (I was to make up the third), a number of Teaching Assistants and several ancillary staff whose tasks included laundry and cleaning work and care of the students at the Centre. Four members of the staff spoke English fairly fluently and from my early discussions with them I was able to glean further information about the history of the Centre.

As I have mentioned, the Engela mission had an established history for providing facilities for people with hearing and visual difficulties. What was less clear but which I managed to piece together from my discussions with colleagues at Engela and through contact with Oxfam UK staff, was that Engela had also catered for children with cognitive 'learning difficulties' at various times during the past, although there seemed to be very little in the way of documented evidence for this. Reports concerning the number of children supported varied, although I found reference to 316 children for the period between 1974 to 1989 (Aipinge, 1990a). The Joint review report (ELCIN 1992, p. 13) also referred to 'the mentally retarded' at Engela, claiming that:

“there was no defined programme to assist the mentally retarded towards any educational level. It was rather a means of providing a short-break for their families during the time they were at the institute. Family members were also briefed in how to care for a mentally retarded person” .

At the end of the war for independence and just prior to Namibia officially gaining independence, the Engela mission together with several other centres throughout Namibia became a camp for returning exiled Namibians known locally as the 'returnees'. Such centres were administered by the newly created Ministry for Lands, Resettlement and Rehabilitation (MLRR). Most of these Namibian returnees had spent at least part of their exile stationed within the camps of the Peoples' Liberation Army of Namibia in Angola, where they had frequently established their own educational facilities, including those which catered for children with special needs. Often these facilities were organised with the assistance of foreign non-governmental organisation funding such as from Oxfam UK.

Many of the returnees experienced in special education gravitated to Engela upon return to Namibia, along with the children and adults that they worked with. Consequently, the



number of people with learning difficulties who arrived at the Engela Training Centre, largely children and young people, increased significantly just prior to and immediately following independence. A report to Oxfam UK and the MLRR by Albertina Aipinge, Co-ordinator of the special needs provision at Engela for what was referred to as the Mentally Retarded Children Project, indicated that in September 1990 there were some 25 'mentally retarded' children at Engela (Aipinge 1990b).

A report by a visiting German social worker Susanne Ludwig, in September 1990 compiled prior to the completion of the new Engela Training Centre buildings described the facilities at Engela as follows:

"The home for mentally retarded children is located in one building on the terrain of the Engela Parish Institute. At present there are twenty children living there in the age range from ~ 5 up to ~ 16 years. They have different kinds of disability. There are two children who are in fact not mentally retarded at all but only physically handicapped. Some of the mentally retarded children are also physically handicapped, some not. Three children are only able to lie the whole day long and they hardly respond to addressing them. Nine women are employed to take care of the children. These women do not have a special training in working with mentally retarded children but only their experiences. The circumstances under which the children are living are very poor.....the sanitation are missing a lot (sic).....the mainly work (sic) of the staff consists in taking care of the daily needs are washing (the children as well as their clothings (sic)), cleaning feeding, etc. Some of the children take part in these daily activities but most of the time they have to do something on their own. In the morningtime some of the women are trying to teach the children Mathematics, English, Oshivambo, etc. but as I mentioned before they do not have a special training although they may try their best. There is a time-schedule for the lessons but it seemed to me that this teaching is not as continuous as it would be to be effective" (Ludwig, 1990, no page number).

Ludwig continued to describe, albeit she admitted from a European perspective, how she felt that it would be helpful if the children had more appropriate activities to occupy them.

By January 1992 the building of the new Engela Training Centre was completed and it fell under the management of the ELCIN Rehabilitation Centre. These new buildings consisted of classrooms, dormitories, an office block, a staff room, and a laundry, and so forth, and were very much in the mode of a residential special educational facility as might be envisaged from a Western perspective.



Following the transfer of management and funding for the Engela Training Centre to the staff at the ELCIN Rehabilitation Centre, it had been decided that rather than operating the Engela Training Centre as a residential facility, solely for people with learning difficulties, it would be most appropriate to transfer the staff and students from the 'old' Engela School for the Deaf and Blind to the new Centre and to accommodate the children with learning difficulties who were also being catered for at Engela.

The Engela Training Centre came to be organised into three departments each adopting World Health Organisation CBR inspired titles. These departments were: Department One for 'people with difficulties in seeing'; Department Two for 'people with difficulties in hearing'; and Department Three for 'people with difficulties in learning'.

*Department Three "For People With Difficulties In Learning"- Early Impressions*

The staff of Department Three consisted of myself and the two teaching assistants who were already in place when I arrived. Although the students, all of whom stayed residentially, from all three departments at the Engela Training Centre were cared for outside of teaching hours by three 'House-mothers', due to the relative immaturity and the greater self-help needs of students from Department Three, a significant portion of the House-mother's role consisted of caring for these students and they were frequent visitors to the Department. This later proved to be very beneficial as the House-mothers were able to assist in providing a further perspective on family life and local child rearing practices which helped my developing sensibility to the local culture and ideas about change.

One assistant, had been designated by the ELCIN Rehabilitation Centre staff to act as my 'counterpart' as it had been envisaged that she was to be the major 'recipient' of my expert knowledge. My counterpart had not been employed at Engela during Susanne Ludwig's visit, but had been repatriated to Namibia, having been exiled during the war, during which time she had received her secondary level education. Since her repatriation to Namibia and employment at the Engela Training Centre, she had received one week's training in disability issues organised at Engela and had attended a one-week Oxfam UK sponsored course on the production of low-cost disability aids in Lesotho.



Together with another teaching assistant also employed within the Department Three, my counterpart, had been organising the daily educational routines for the students within the Department over most of the previous year. My counterpart had effectively had no supervised support for organising the Department and her 'assistant' status at that time rendered her effective management role unclear. The second assistant, who spoke no English, also had very little experience and no training in working with children with special educational needs.

There were very few records or documentation maintained within the Department concerning most aspects of its organisation, past or present. The exception was the register which recorded the names of all of the students who attended, together with the names of the parishes from which they originated. Dates of birth were not included in the register, nor were any details kept of when the students first arrived at the Engela Training Centre. There were also no documented details of the curriculum or any evidence referring to teaching programmes, daily teaching plans, records of student progress, etc.

My counterpart explained how that she typically tried to organise the teaching week with the expectation that all of the students would attend the same class and that for each half-day a different subject was taught on this whole class basis. The unrecorded curriculum was based upon her early experiences as a primary aged student herself. In this curriculum she had included the key subject areas of English, Oshivambo, Mathematics, Religious Education and Handicrafts. Both of my colleagues explained how they were very concerned at their own lack of training and limited experience in teaching children with special educational needs. My colleagues also claimed during our early departmental meetings, that they were encouraged by my arrival as they considered this to herald the beginning of their training.

Reflecting upon my own rôle and how I might make some contribution to the Department I was at least quickly assured that there was plenty of scope for change and I realised that I would have ample opportunity to introduce a great degree of in-service training. From my Western perspective, the early analysis of the Department had also revealed that there was an urgent need to ensure that some 'systems' were put into place and that we began to document and record both our plans and progress.



At the time I joined the Department there were seventeen young people and children attending who, as with the other students in Departments One and Two, remained at the Engela Training Centre on a residential basis, returning home only during school holiday periods. Most of the students within Department Three had been present at Engela during the visit of Susanne Ludwig in 1990. Indeed, apart from the change of building, the overall circumstances regarding the management of the Department and the daily routines seemed to very much match those of Ludwig's description.

From my initial observations and through discussion with my counterpart, it appeared that the students presented with a very wide range of disabilities and special educational needs. Their ages ranged from approximately 5 years old through to 20 or 23 years, although birth dates were not available for most of the students.

Concerning the students, my counterpart, as Susanne Ludwig's report had also earlier suggested, believed that three were probably intellectually at least of average ability. However, all three had apparently spent many years either in Angolan refugee camps and other residential facilities, living alongside other students, most of whom had, at least by Western standards, very significant learning difficulties. Also, as these three students had had very little or no contact with their families, some aspects of their social behaviour, as judged by my colleagues, had also been affected. Regarding the other students, six were aged between approximately 5 years and 18 years and appeared to have Down's Syndrome which had led to them experiencing a wide range of moderate to severe global developmental difficulties. A further eight students demonstrated a range of very severe disabilities and difficulties. That is, I believe that their levels of difficulty would have been judged severe by Western conceptions of disability and they were certainly considered to be so by my colleagues at the Engela Training Centre at that time.

The majority of the students who were within the Department had difficulties which might have also placed them within more specialised educational placements had they been living within the United Kingdom. In some respects I found this reassuring because at least it seemed to suggest that we shared at some level a similar understanding of what constituted a 'disability'. Likewise, it was encouraging to hear my counterpart and my other colleagues questioning the appropriateness of the placement of three of the



students within the Department, who they felt did not have severe difficulties, as this also tallied with my initial judgement of their levels of ability. Again, this seemed to indicate that there was a good deal of common ground between my Western and professional notion of disability and that of my colleagues. Perhaps the degree of concurrence between my outsider's views of the children's abilities and that of my colleagues was not surprising, as many of the students had very severe difficulties, both socially and intellectually, which would probably be accounted for in the West as physiological in origin (Edgerton, 1984).

To my colleagues' knowledge, none of the children had been placed at the Engela Training Centre following any expert assessment, neither medical or psychological. This suggested that most had been identified as needing special support effectively through what might be called a process of socio-cultural consensus, conducted between their families and other local people. However, when discussing the strengths and needs of the students and the reason for their placement at the Centre, I was interested to note that most of my colleagues referred to the lack of social competence of the students. Often this was termed as their "stubbornness" in following the requests of elders and their inappropriate social communication skills. My colleagues generally also recognised the students' poorly developed self-help skills and limited ability to contribute to household duties as facets of their disabilities. None of my colleagues referred to any particular medical aetiology of the students, such as the fact that some children had, in terms of a Western medical categorical perspective, Down's Syndrome. To some extent this seemed to concur with other studies (Walker, 1986; Scheer and Groce, 1988; Serpell, 1988b; Groce and Scheer, 1990; Miles, 1992; Ingstad and Reynolds-Whyte, 1995) which refer to how traditional African societies view notions of 'disability' often primarily in relation to children's social skills, rather than as we are often preoccupied with within the West on any physiological or cognitive basis as I will discuss further in Chapter V.

For all of the students attending Department Three, there was very little contact with their families during term time. In addition it was clear from discussion with my colleagues, and later with the students' family members, that families were not involved in or generally aware of the curriculum operating within the Department. There were no 'parent evenings' or parental visits designed to discuss students' progress or to exchange information between the families and the staff of the Department. This lack of liaison



with families also extended to one of the students whose family lived only 15 minutes walk from the Engela Training Centre. Indeed, this seemed to be the general pattern of practice for all of the students attending all three departments at the Engela Training Centre.

Discussion with my colleagues highlighted a further issue regarding the students which appealed to my own professional integrationist values and which had relevance to our later plans for the Department. My colleagues described how many families had mentioned that the school vacation periods could present significant difficulties for them in managing their children. Families had complained that the students returning home often became too accustomed to the 'better' food (regular varied fish, maize and meat dishes) provided at the Engela Training Centre and that the children sometimes complained about the staple 'oshifima' which they were expected to regularly eat at home. Also, while at the Centre the students had become so used to attending classes and playing, that some were perceived by their families as reluctant to help at home or "lazy", refusing to take part in the daily domestic chores expected of all children locally, such as fetching water and firewood, caring for the animals and other general agricultural duties. Some families also complained that their children had acquired "bad habits" since they had first joined the Department, such as being less independent regarding toileting and self-care, both of which were usually overseen by the House-mothers at the Engela Training Centre.

As the children inevitably spent a considerable amount of time away from the family, this may have accounted for why some families also complained about the poor social skills of their children, such as the lack of deference that the children showed to other family members. Likewise, it seemed that some of the children occasionally forgot how to participate in family routines and customs specific to their family, and consequently this could also present difficulties for families who tried to fully include the child in family life. Moreover, and very important for the expectations of many families, was their view that children should learn new skills while at the Engela Training Centre. However some families also complained that, despite years of attendance at Engela, their children remained largely illiterate with some even forgetting academic skills that their families had previously taught them prior to joining the Department. This complaint may have also suggested that the students' families did not have a full understanding



about their children's disabilities or it could also have indicated that they may have had unreasonable expectations of what the Department could provide for their child.

Most of the students who attended Department Three had done so for several years and there had been no new entrants since the management of Albertina Aipinge. Additionally, there were no plans to recruit other children who might also attend the Department. Nor was any provision made to provide information to local communities about the facilities of the Department. There was also no agreement about what the maximum number of students might be who could be catered for within the Department. Effectively, as it seemed to me at the time, Department Three represented a relatively costly provision that was only available to a few. Equally, there was no notion of how long students should remain with the Department or at what age, if any, they should leave. This may have also accounted for why there appeared to be no programme to help students reintegrate back into their families, as there seemed to be no expectation that they would leave the Department. I was also interested to discover from discussion with colleagues from the other two departments that few new students had been recruited for the courses that they also offered.

### *The Daily Teaching Programme*

In order to learn more about how the Department functioned, I agreed with my counterpart that it would be useful if I initially simply observed the daily activities within the Department and subsequently discussed issues and ideas with my two colleagues at the end of each school day.

From observing the teaching activities of my colleagues, it seemed that whenever they attempted to occupy the students in tasks which they felt were meaningful educational activities, the nature of the students' difficulties and the vast range of their abilities and needs led to very few students being actively engaged and most were unable to focus upon the essentially rote style learning activities. In many respects my colleagues approach to teaching seemed in-line with that which is reported in many other African primary and secondary school classrooms (e.g. Nwakoby and Lewin, 1991; Stuart, 1991; Chapman, et al., 1993; Prophet, 1995; Pryor, 1998) in that their teaching technique was whole-class, teacher-centred and drill orientated. The students were encouraged to answer teacher chosen questions and engaged in activities, such as reciting the days of



the week in English, naming pictures of animals in Oshivambo, or they were set exercises in which they were required to copy letter shapes from the blackboard. As most of these tasks seemed to be beyond the abilities of the majority of the students, in that many could not fully comprehend the instructions, the behaviour of the group of students tended to deteriorate into noisy disarray. Students who had very severe levels of need frequently spent considerable parts of the observed lessons either engaged in self-stimulating behaviour, such as rocking or similar repetitive mannerisms, or interfering with and distracting other students. Much of my colleagues' time was directed towards settling disputes, calming conflicts and attempting to impose discipline.

The teaching programme seemed therefore, from my Western perspective, to be chaotic and arguably even potentially detrimental to the students' general well-being, as in the confines of the classroom they often came into conflict with other students and received regular reprimands from their teachers. As the teaching objectives were pitched well beyond their ability and attention skills at that time, the students had little opportunity to gain from any sense of achievement through learning new skills.

#### **3.4.4. An 'Emerging Picture' of Problems**

Over the course of my early introduction to Department Three I had been able to identify what I understood to be a range of areas and issues that needed to be tackled. These issues were identified as problems primarily because they did not correspond with my own understanding of how I judged a special educational needs department should operate. I had therefore recognised that my responsibilities as Head of Department would include issues such as meeting my colleagues training needs and establishing new and improved systems of management, in addition to the development of and changes to the educational programme provided for the students. I also fully realised that these changes would need to be negotiated and implemented with the consent and collaboration of my colleagues. Fortunately, I understood that the areas I had identified as in need of change and improvement were also perceived as concerns and problems by both of my colleagues and the other Engela Training Centre and ELCIN Rehabilitation Centre staff. It would have been quite feasible to imagine how both of my departmental colleagues might have been quite contented with how they had already managed to organise the Department for themselves and with the working arrangements that they had grown accustomed to. Potentially my colleagues might have been resentful of my



uninvited (certainly by them) intrusion and its possible implicit assumption that they were not coping adequately.

However, I had also been made aware of other professional, non-technical concerns, that I had never been fully conscious of while working with colleagues within the United Kingdom. As such, I recognised that there were some very complex relational challenges ahead for me both professionally and personally and that my expert role had to necessarily be more than a concern with the technical sharing of my knowledge and the instrumental practicalities of programme development.

For example, it seemed that professionally the morale of both of my colleagues was fairly low as, according to their own reports, they felt isolated and marginalised both from the ELCIN Rehabilitation Centre and more immediately within the Engela Training Centre. Their Department had been identified as operating unsatisfactorily and in need of some major changes and, by implication, they saw their own efforts as being criticised by others and deemed to be inadequate. Yet while both Departments One and Two had been able to benefit from further resources and expert input, Department Three had been overlooked. Both of my departmental colleagues felt that they had been left to struggle on in difficult circumstances and unjustly criticised for what others perceived as departmental shortcomings. Consequently I found that I would also be working alongside colleagues who lacked confidence in their own abilities and, to some degree, were resentful of the Engela Training Centre and ELCIN Rehabilitation Centre structure. Furthermore, both of my colleagues were in danger of leaving the Department at the first opportunity. It therefore seemed clear to me at the time that whatever course of action I hoped to recommend, one of my immediate concerns was to be how to ensure that I improved the confidence and commitment of my colleagues to the Department.

I started to understand how in effect I also shared some responsibility for not only my colleagues' career development and training but also how they viewed and valued themselves as professionals. I realised that whatever enterprise we were about to become engaged in, its successes or failures would inevitably have implications for their own self-esteem. I do not mean to imply any patronising paternalistic concerns as my colleagues also had responsibility for themselves in what was to be our joint venture.



However, my concern for their well being clearly was also going to figure in the journey we were all about to embark upon.

Indeed, while the technical areas I had identified for change and ‘improvement’ were obvious opportunities to professionally become engaged as part of my new posting within the Department, they were all firmly predicated on the nature of the relationship that I established with my colleagues. Whatever my views concerning changes to the Department, these would come to nothing if my relationship with my colleagues was not at least amicable. I was wholly dependent upon their agreement and the nature of our relationship would determine whether my placement at the Engela Training Centre would be ‘productive’ and ‘successful’ or a series of frustrating battles. Again, while I had been involved professionally in many projects within the United Kingdom where I had been called to work collaboratively alongside colleagues from other disciplines, I do not think that at any time I had really consciously understood the importance of the inter-relational aspect of our tasks. Perhaps this was because in my own country I shared many cultural understandings with my co-workers, those taken for granted assumptions about how we would respectfully behave towards each other and the assumptions about what our respective roles would be, so that the technical aspects of the task ‘naturally’ assumed the focus of our effort.

In contrast, within Namibia, surrounded by colleagues with whom I could not assume a shared understanding, I think I became conscious for the first time of how I was primarily engaged in an ethical endeavour rather than some technical enterprise. Ethical not simply in regard to how the present circumstances challenged and even offended my own professional and personal values, but ethical in the immediate sense that I had to deliberately and closely consider the possibly different views, opinions and feelings of those with whom I was to work. In short, through this initial analysis I began to appreciate even at this early stage of my involvement, that my expert role inevitably had to be developed enactively if I was to prove helpful to my colleagues and to find the challenge professionally rewarding myself. This recognition was to be the first highly significant step on my professional and personal learning trajectory, as I will describe further in Chapter IV concerning the ‘second-order’ account of the Programme. What I did not immediately understand at that time, but came to realise later, was that many of the difficulties that I had become aware of, particularly regarding the manner with which



I was able to relate to my colleagues, were to become the foundations for a major re-envisioning of my role and my understanding of expert practice. It was also this aspect of professional and expert engagement which had been absent from most, if not all, of the reports and articles regarding Portage programme development that I had read prior to my arrival in Namibia.

#### **3.4.5. Views About My Role As Head Of the Department**

I have explained within my review of the Portage research literature how ideas for Portage implementation within developing countries are largely pictured and understood within technical terms. As I have also described, seen in such terms the role of the Portage expert effectively becomes one of sharing and applying their Western knowledge in order to match the programme to local needs. This view also essentially characterised my own understanding of what my role might entail prior to my experience at the Engela Training Centre. It is also a view of expert engagement similar to that which Goodman (1995) termed the 'medical' and 'purchase' models of development. From my early discussions with colleagues at the ELCIN Rehabilitation Centre, the 'problems' regarding the Engela Training Centre and specifically within Department Three were also seen to require 'treatment' through the application of my expertise and the subsequent development of some solutions.

It appeared that both the staff at the ELCIN Rehabilitation Centre and the Engela Training Centre, including my departmental colleagues, also seemed to believe that their own professional skills at that time were somehow deficient. My colleagues at the Centre, despite some of them having worked with children who had special needs for many years, felt that they had accumulated little expertise regarding children with severe cognitive learning difficulties. My colleagues appeared therefore to see my arrival as an opportunity to learn and 'purchase' contemporary Western special educational needs knowledge and practice skills. Of course, while this narrow perspective of expert intervention places a great deal of responsibility for change upon the expert, it also positions them in a highly influential role. I found that my colleagues were effectively investing power in me concerning the nature of our professional-colleague relationship. This, coupled with their expectations and assumptions concerning the supposed superiority of my professional skills for remedying their problems within Department



Three, effectively made the development of a more equitable professional relationship challenging.

On reflection, the familiarity of this role and the ease with which I accepted the responsibilities it entailed, should have also raised my suspicions about my own complicity and degree of influence in possibly steering events so that they could be read as such. Just as researchers have been criticised for learning to be “finders of situations in which [their] hypotheses can be demonstrated as tautologically true” (McGuire, 1973 p. 449, quoted in Gergen, 1978b, p. 511), perhaps I self-deceptively also construed particularly the technical challenges within the situation to accord with my previous professional experiences. At that time, however, given the pace of events and an eagerness ‘to contribute’, I did not question my understanding about my role. Rather, I began to follow a pattern of action with which I had some prior experience. Perhaps this not only reflected the power imbalance in the relationship I had with colleagues, but simply demonstrated, given the uncertainties that both myself and I imagine local colleagues felt, how we all at times of stress and doubt typically fall back upon that with which we feel confident and familiar and avoid potentially complicating and challenging thoughts and actions. Overall, therefore it seemed that at least initially my expert role in relation to my colleagues, was determined enactively by both my own and my colleagues’ assumptions and expectations.

My colleagues’ training was therefore anticipated to occur through a variety of means including my providing both specific workshops and general in-service training opportunities, as well as through their direct management and supervision. The logic of this plan seemed to be that once the staff had been fully trained in delivering an appropriate curriculum to the students through suitable special needs teaching techniques, they would eventually be able to follow the programme independently. Indeed, this had been the pattern of development that my colleagues had come to expect from the earlier and continuing involvement of other expatriate staff.

#### **3.4.6. Ideas About Change**

It had been my understanding that ELCIN had sought expert assistance for Department Three, as they had concerns about how the Department operated and that they therefore anticipated that some changes would be necessary. However, as I also readily came to



understand from an awareness of the complexities within the relationships that existed between ELCIN, the Engela Training Centre and Department Three, this did not automatically ensure that all of the staff involved believed that change was necessary.

Leach (1991) was aware of similar difficulties from her study of various development projects within the Sudan. Leach commented upon the 'perceptual gap' that existed in some of the projects between local senior management and local staff over important project matters. Leach (1991, p. 161, insertion added) claimed that it was not surprising that such a situation arose given that:

"staff usually had little opportunity to express an opinion at this stage [project planning] and did not have access to the project documents. Lack of information led to misunderstandings and resentment about the motives of senior management in agreeing to the terms of the project".

Indeed, my own early concerns were that colleagues at the Engela Training Centre had had very little involvement in the decision regarding the need to seek expert involvement in the first place, or specifically with my own recruitment. However, as I have mentioned, fortunately most of my colleagues regarded some change certainly within Department Three as necessary. Also, it seemed an understanding that some change was called for was very much a central theme in all of the conversations of how the Department and the Engela Training Centre operated. In particular my departmental colleagues described how they were finding the daily management of the Department troublesome. However, while I came to understand that there was a general consensus that change was needed, there was not any general agreement about what direction change should take.

There seemed to be an agreement that most of my colleagues believed that the group of students within Department Three were not benefiting from their time at the Engela Training Centre under the arrangements at that time. From my colleagues' awareness of CBR and its underlying philosophy, it was understood by most that a less academically orientated curriculum, one which emphasised practical daily living skills, would probably prove more appropriate. There were also general concerns among most colleagues about the wide range of abilities of the students attending the Department at that time.



From my own perspective, I was also encouraged that there seemed to be a general belief amongst most colleagues that ideally some form of integration of the students into local schools would be preferred. However, I think most of my colleagues also recognised that for many of the students within Department Three, integration into local schools was not a viable option, as this would prove very difficult with the current educational attitudes, directions and levels of resourcing of mainstream primary schools in the area. This was further confirmed by several meetings I held with Government staff from the local offices of the Ministry of Education and Culture who suggested that the local schooling system was unprepared in material resources and staff attitude to receive children with such severe levels of disability into their classes. However, I was also interested to note ELCIN's (1992, p. 8) reference to the Engela Training Centre's need to develop "a system of follow up of the children whether in school or at home". I also discovered an earlier reference to community level support within an untitled report by Albertina Aipinge (1990a), recommending the need for home-based training, Community Based Rehabilitation and also vocational training.

### **3.5. PLANNING: Changes Within Department Three**

Chronologically, the 'Planning stage' might be described as broadly beginning in July 1992 and continuing until March 1993 when the Engela Portage Programme began. This was a period fraught with both concerns and anxieties, although professionally it also proved to be tremendously fruitful, not simply in terms of the ideas generated or the relationships built, but because it was during this period that I began to gain a wider and more critical understanding about the complexities of expert practice.

#### **3.5.1. Plans For Change**

The initial plans and ideas which arose were essentially the product of my own hypothesising about how we, as a Department, might proceed. These were based partly upon what I had learned about the local situation and also from discussing various issues with my colleagues, together with gauging their reactions to my suggestions. This 'hypothesising' is probably a crucially fundamental and natural activity for most experts but one which seems to be usually also taken for granted within the literature concerning expert practice. I certainly at that time gave little reflection to this complex aspect of Portage expert practice. However, as a process of professional agency and development,



hypothesising is surely also worthy of greater consideration. I shall discuss some of the complexities of the issues associated with my own hypothesising later in Chapter VI.

Clearly, considerable collaboration was also an inevitable feature of my involvement within the Department. Consequently, over the course of my initial involvement during the first few months of 'information gathering', I had no other option but to fully consult with colleagues about what I imagined were possible ideas for the future direction of the Department. I believe this also serves to demonstrate the notion of the experiential trajectory of practice-research described by Usher et al. (1997) which I have referred to within Chapter II in which alongside the dispositional self of the practitioner-researcher, the situational aspects of the research context are also highly significant as part of that enactive relationship.

Certainly scope for any professional coercion of my colleagues on my part, such as forcing through a plan and imposing ideas on my colleagues, even if I had considered this appropriate, was limited. For example, I was not representing any funding donor who could dangle the threat of withdrawing financial support if the project appeared to be off-target from guiding principles. In effect any influence that I had primarily stemmed from maintaining the goodwill of my colleagues, especially those within Department Three, and their confidence and trust in me professionally. I was very mindful of this and I think that the 'strangeness' of my new circumstances, and their very unfamiliarity, made the task of proceeding not only challenging but also more deliberately conspicuous. I became far more conscious of the processes of collaboration than I had previously experienced while working within the United Kingdom. Indeed it was at that stage that I also first consciously began to appreciate the importance of what Tomm (1987) referred to as 'strategising', that is ensuring one's actions lead to effective ongoing collaboration with one's colleagues and which I will also return to discuss in Chapter VI.

While realising that change was necessarily going to be a collaborative endeavour, following the months of 'Preparation', I nevertheless found myself in a position where I needed and indeed was expected to begin to consider ways forward and so to effect some change to the Department. At that time there seemed to be several courses of action that we as a Department could reasonably and practically consider. Having discussed the



range of possible options with my Departmental colleagues and others within the Engela Training Centre and the ELCIN Rehabilitation Centre, it was clear that they held a variety of views.

Perhaps less ambitious, but quite feasible, would have been to choose the option in which Department Three continued to operate as a residential facility for a group of students with severe learning difficulties. This would have entailed much less change and an emphasis on my assisting colleagues to improve the Department's organisation and management, such as through addressing curriculum issues, teaching approaches, recording keeping, planning and evaluation processes, and so on.

We also considered the possibility of introducing a local CBR programme operating out of the Department in the manner advocated by the World Health Organisation. To varying degrees many of my colleagues seemed to favour a CBR type approach as a possible 'modern' solution to meeting the needs of most of the students. Unfortunately, from their own experience, the ELCIN Rehabilitation Centre CBR staff in particular had encountered problems and difficulties while working with children and adults with severe learning (cognitive) difficulties which led to them questioning the feasibility of this potential change of direction for Department Three. Therefore little consideration had been given to the possibility of Department Three also being arranged along community-based lines. Nevertheless, it seemed, at least in theory, that the Department might usefully and potentially work together with the ELCIN Rehabilitation Centre, possibly as an extension of that programme or alternatively initiate a new programme locally in the Engela district. However, the staff at the ELCIN Rehabilitation Centre, and also my Engela colleagues, seemed wary about the idea of Department Three developing its own CBR programme. For example, the staff raised objections about the duplication of efforts locally and the lack of financial support that would be available to the Department, compared to that used to set up the ELCIN Rehabilitation Centre CBR programme.

Politically, I was also concerned that by adopting a CBR approach this would inevitably risk setting the Department on a course in which it might be perceived as in competition with the ELCIN Rehabilitation Centre team. If this rivalry occurred, as relations were already strained between the Engela Training Centre and ELCIN Rehabilitation Centre, it



might simply inflame the situation. Also from my observations of the way the CBR programme was structured at the ELCIN Rehabilitation Centre, and from discussions with the local staff and Rehabilitation Workers, I too had reservations about the effectiveness of the World Health Organisations model of CBR locally, particularly in regard to supporting children with severe learning difficulties. What was also important was my awareness that, at the heart of Department Three's identity, it historically and currently catered for children and young people with severe learning difficulties and that locally at least, despite the problems within the Department, this was where the expertise of my colleagues was focused. Consequently, after discussion and careful consideration, for political, practical and historical reasons, CBR as an option did not appear to be very attractive to all concerned.

My own preferred option was to consider developing a home-based teaching programme locally along the lines of the Portage Programme. I favoured this option, not only as I believed it to be the most appropriate for the children whom the Department supported, but as it also related most closely to my own experiences and training. However, when discussing this possibility with colleagues, I was far from confident that this would actually prove entirely feasible locally and I realised that if we were to pursue this option, it would involve a much greater degree of further planning and inquiry. Nevertheless, following discussion, this option seemed to appeal to both my departmental colleagues and to other colleagues at the Engela Training Centre. I think that what must have been particularly persuasive was that, in addition to my own enthusiasm for this option, I was also able to produce the Portage Early Education Programme materials which were among a range of other resources I had brought with me to Namibia. These materials may have appeared as fairly impressive to my colleagues, given the Department's lack of material resources and other documentation at that time. I was also able to assure my colleagues that I was aware that Portage had proven to be successful in the United Kingdom. However, my counterpart, who had some knowledge of the culture and conditions of Western society, was like myself also well aware that a programme that was reported to function effectively within the United Kingdom might not necessarily be equally applicable to families in northern Namibia. There were some significant questions and problems that would need to be addressed if we were to consider this alternative, as it involved some major changes centred around altering the operation of the Department, from the provision of longer-term residential



courses for a small number of students, to one which would provide a home-based teaching programme for many more students.

A final possibility was to consider some combination of the above options, perhaps offering both a residential facility, possibly for short-term placements, together with a level of community and home support. In theory, this would have allowed the Department to continue along its present lines, albeit with some significant improvements in relation to the management and educational provision, and also allowed for links to be developed with the students' homes, so that relevant skills could be taught and their families involved. However, I was aware that if this option were to be adopted, then the limitations associated with providing support for children with severe learning difficulties within a residential facility would still remain. Of course there may have been a range of other alternative options, yet at the time these did not come to mind and if my colleagues had other ideas about what we should do, they did not share them.

All of these possible options seemed to be both potentially feasible and plausible. Conscious of my own preference, aware of our cultural differences and increasingly mindful of the processes of collaboration, this period represented a significant turning point in my own understanding of the wider effects of my presence and my role within the Department. We continued to hold a succession of both formal meetings and, as the occasions often arose, numerous informal conversations in which the range of possible routes ahead was discussed repeatedly. The various merits and drawbacks of each of the considered options were reflected upon and mulled over. It would be disingenuous of me to suggest that I did not wield some significant influence by virtue of my status as the 'expert' and possibly due to my being a Westerner and also, important within the local culture, male. However, I do not believe these personal characteristics alone would have allowed me to have unduly imposed my views. This entire process of consultation was also important, in that it encouraged an open and more reflective relationship between me and my colleagues, which became a useful generative and significant characteristic of most of our departmental decision-making throughout the course of my time within the Department. I also think that the importance of the emerging relationship lay not just in my recognition of how dependent I was on my colleagues, but that they too came to see that they were being invited to contribute and, what is more, had to take an active role if we were to successfully work together.



Whatever the complexity of the machinations at that time, what emerged from all of the deliberations was a general favouring for the Department to work towards establishing a home-based programme. Clearly, reorganising the Department from the residential approach which had been in operation for several years and with which my Engela Training Centre colleagues had become accustomed, to one which was radically different and untried locally presented some considerable risks. If this reorganisation failed, it would have been seriously disappointing to the expectations of my colleagues and local families, possibly deepening the further sense of low expectations and failure which I felt seemed to surrounded Department Three at that time. Moreover, failure risked adding unnecessary disruption to the Engela Training Centre as a whole. Consequently, considering the risks involved, my colleagues' overall enthusiasm to embark upon introducing significant changes to the Department was also tinged with a fair degree of trepidation. Nor were they alone. While I had knowledge and training concerning Portage from my work in the United Kingdom, I had not actively been involved in the running of a Portage service. Neither, with my relatively little experience of the culture and home circumstances locally, was I fully confident that a home-based teaching programme would prove viable. As such, we decided that a tentative and deliberately provisional approach seemed prudent, one which allowed some exploratory investigations and trials of key Portage principles, while also continuously reflecting upon our progress, together with initially continuing to maintain the residential and institutional role of the Department. Accordingly, the overall planning for change within the Department entailed both experimentation and, as far as possible, gradual change.

As a team we therefore mapped out a series of broadly conceived systematic steps that we believed would eventually lead to the Department being able to provide a home-based Portage programme locally. Initially this entailed reorganising the teaching approaches and programmes within the Department. Indeed future options aside, a more immediate challenge to the Department at that time was that we already had a group of students who had to be catered for, at least in the short-term. However, the two key tasks, that of potentially developing a home-visiting service along Portage lines and more immediately the accommodation of the present students, were at that stage not necessarily incompatible. Moreover, working with the group of students who were already attending the Department appeared to offer valuable opportunities to introduce



my colleagues to new teaching techniques and working practices, which they could use in the classroom with the students and which would hopefully also prove to be relevant to a Portage type programme in the wider community.

Alongside teaching the group of students within the Department at that time, we also needed to consider how many other potential students lived within families locally. We acknowledged that there was little point in devising a home-based programme until we were certain that there were a sufficient number of families locally who we could potentially support and who also wanted to be supported. Some surveying of the local community was therefore called for and we realised that even if we concluded eventually that a home-based programme was not viable locally, we felt confident that the survey information would prove useful for recruiting other students to the Department.

As part of our deliberately cautious reorganisation, we also envisaged the implementation of a small pilot programme to begin to test the feasibility of a home-based teaching programme locally. It was anticipated that this would also personally provide me with further opportunities to visit local homes, through which I could learn more about the culture of local families and children and their needs.

### **3.5.2. Early Changes Within The Department**

By the end of July 1992, some six months since my arrival within the country, the Department had already begun to be reorganised and changes put into place. These included the following.

#### **Designing Assessment Tools And A Basic Skills Curriculum**

Concerning the development of assessment materials, while I was aware of the likely inappropriateness of some of my Western notions, such as in relation to the developmental progress of children and possibly even the use of behavioural approaches, I felt that I had little opportunity to consider alternatives. Time appeared to be pressing. What I now on reflection realise is that this was my own self imposed agenda and my own time scale to which I was working, not necessarily that of my colleagues. Consequently, I can also now understand how opportunities may have been missed to consider what alternative conceptualisations regarding the students, local children, curriculum topics and assessment might have also been vying for consideration but



which were overshadowed by my own presumptions and haste. This again serves to demonstrate how expert practice and research can be affected by complex and multiple circumstances and that it does not simply, as we are often led to believe, reflect a straightforward process of rational decision making steered by the parameters of the problem.

Among the materials that I took with me to Namibia were two criterion-referenced tests which I was able to use as the foundation for our test constructing work. These tests were the Early Learning Skills Analysis (ELSA) (Ainscow and Tweddle, 1984) and the NFER-Nelson Portage Checklist (NFER-Nelson Portage Early Education Programme, 1987). Working with my departmental colleagues, together with other teaching and care staff at the Engela Training Centre, we initially considered the suitability of each of the individual items within the ELSA materials. From the outset we were able to dispense with a whole range of suggested teaching objectives from ELSA which were quickly deemed to be inappropriate to the local context by most of those engaged in the curriculum construction process.

The Portage materials provided a wider range of curricular objectives and so offered an assessment tool to use with a broader range of student, as indeed they were designed to do, with a suggested age range from 0 months through to 6 years. Again, we needed to not only translate the teaching objectives but to begin a fairly lengthy process of sifting out those items which we felt were not applicable locally and adding others which we recognised were missing but relevant to northern Namibian students and children. Eventually we were rewarded by the constructions of the first draft of the Engela Portage Checklist. This process inevitably consisted of a collaborative exercise and again I found that the most useful means of achieving this was through a process of group meetings and discussions.

Despite this whole process of assessment and curriculum design proving to be rather protracted, the result was that we had available materials, which formed an initial curriculum that we could begin to use to work with the more able students from within the group, and also materials and a curriculum which was suitable for those with even more significant needs. Moreover, we realised that we could use both of these sets of



materials as a means to begin to assess the students and as a method of judging their progress, thereby also allowing some evaluation of the teaching that took place.

I also appreciated the enormity of the personal interactional difficulties presented when focusing on such tasks with colleagues from a different cultural context, although the literature related to Portage material adaptation makes no reference to this important aspect of the whole process. I find it astonishing that Oakland (1997), for example, was able to claim that little change was necessary to the original Portage Checklist when he implemented the Portage programme within the Gaza Strip. I wonder whether Oakland's experiences were related to the fact that he was unable to work with his Palestinian colleagues for prolonged periods and thereby build a professional relationship which encouraged a more critical analysis of the presented materials. Indeed, initially I found that some colleagues needed a considerable degree of encouragement to criticise and question any of the original Portage items. Whether this was because they were somehow in awe of the original items or they felt that Namibian children should be expected to engage in those types of behaviours, or even that they did not wish to imply any criticism of my culture or of me is unclear. I also came to recognise that one of the potential difficulties of Western experts presenting the United Kingdom Portage Checklist is that its neatly published, well presented form may convey a sense of authority and closure, and consequently some local colleagues may occasionally be reluctant to criticise or amend parts of it. Hunt (1987) similarly suggested that consultants working with teacher colleagues should avoid using a 'slick package' in favour of a rough draft, as this enables teacher to more readily adapt the package to their own needs and ideas.

It is possible that the opportunity to work closely with local colleagues for protracted periods, where professional priorities privileged the development of a collaborative working relationship, in addition to concerns with a programme's implementation, further demonstrates how a systemic understanding of expert involvement can prove professionally beneficial. Throughout this period I continued to appreciate that the manner of my intervention locally was not simply a matter of developing my own personal style of practice, but also about recognising how I was burdened by some hefty cultural and conceptual 'baggage' of my own. It was through the collaborative process of working alongside colleagues at the Engela Training Centre that I also began to



appreciate the importance of my ability to both reflect upon my role and working relationship with my colleagues, and to become more reflexive about my own conceptualisation regarding issues such as children's development. I also became further aware of the danger of my own preconceptions and the potential power that I had in influencing my colleagues' views. All of this seemed to indicate a crucial need to foster a more trusting collaborative working relationship if we were to learn from each other and if we were to work effectively with local children. As I came to understand again and again throughout my time in Namibia, and as I am reporting within this thesis, it was these complex social and relational aspects of professional practice which became crucial in determining the success of my involvement. These relational issues were raised not simply in regard to how I worked with my colleagues, but later between us and families and indeed within families and their children.

#### *Working With The Students and Introducing Behavioural Teaching Techniques*

Having established the first Engela Portage Checklist, we were in a position to start assessments of the students within the Department and to further consider what curriculum targets would be most suitable to their individual educational and developmental needs. Over a period of three to four weeks working with my departmental colleagues, and later with some of the other colleagues from the Engela Training Centre, we were able to assess each of the students. This provided not only the opportunity to teach colleagues how the checklists could be used but we were also able to analyse aspects of these newly constructed checklists and curriculum and to make various amendments, additions and sometimes wholesale changes which we could again subsequently retest.

Given the wide range of ages of the students and, of more concern, the diversity of their educational needs together with our limited staffing numbers, the option to reduce the number of students was discussed with my departmental colleagues and the staff of the Engela Training Centre. I felt that this reduction in the number of students was unavoidable, if we were to simultaneously explore the option of working with families within their own homes which we had tentatively agreed to work towards.

I suggested that we might work for a further period of three months, initially with just eight of the students who we considered had the most severe difficulties, while sending



the other students home. The plan was to then re-invite the other students to return to the Department for a later course. The other departments at the Engela Training Centre offered three-month courses to their students and therefore this seemed to be in line with wider expectations about the operation of the Engela Training Centre. Initially the suggestion of reducing the number of students caused some concerns, as some of my colleagues were worried about how the students' families might react. It was also generally acknowledged by colleagues that, although a more community or home based role for the Department might prove the most effective use of the limited resources, this would not necessarily be seen as the best option by those families whose children already had a place at Engela. However, I felt that we could prepare the students' families for change by informing the families of the first group of students that we would effectively be providing them with several months notice of the change ahead, and also the families of the second group of students would be assured that they would be catered for during the following term. My colleagues seemed to rest easier with these suggestions.

Using the checklists and assessment tools that we had constructed, we were then in a position where we were able to select eight students from the group who our observations and the individual assessments suggested had the most pressing special educational needs. It was decided that these would be the students who would remain within the Department from September 1992 until the Engela Training Centre closed for the four week December vacation, a further period of approximately three months.

Other changes within the Department at this time consisted of my counterpart's promotion from teaching assistant to Instructor, so as to reflect the wider duties that she had been assigned. Also at this time, although we were informed that there were no further funds to employ any other members of staff, given the reduced number of students who now resided in the Engela Training Centre as a whole, we were able to agree that one of the House-mothers would join the Department as a further teaching assistant, so that the department would consist of four staff in all.

The initial group of students returned to their home in September 1992 to await return in January 1993 and, by the middle of September, our new classroom routines and teaching approaches had already become firmly established with the remaining group of students.



### **3.5.3. Planning To Provide Home-Based Teaching**

Simultaneously, as we taught the two groups of students during the period through to March 1993, we were able also to start to prepare for the possibility of providing a home-based teaching programme. However, at that time we were still unable to determine whether such a service would actually be a viable option locally. For example, there were demographic questions such as whether there was a sufficient number of families locally within the reach of colleagues from the Department who had children who might benefit from a home based service. If so, we needed to find out the range of ages of the children we might expect to support and also the extent of the learning difficulties and disabilities these children might present. This information would be crucial to determining significant features of any future programme we were to offer.

Likewise, there were also a range of family and culture related questions we needed to answer, such as whether the type of programme we envisaged would be welcomed by families and whether family lifestyles, practices and priorities also made such a programme feasible to operate. Even if families locally felt that the service we planned had something to offer them, we also needed to discover whether the teaching materials and teaching approaches that we had modified and adapted from the United Kingdom Portage Programme would prove effective in peoples' homes. Would the success that we appeared to have using the materials and approaches in the classroom be repeated within the homes of children locally when used by family members?

As a beginning, we had already started to address some of these questions by September 1992, both in terms of planning to support some of the former students with more severe difficulties when they returned home at the end of their course, and also by conducting surveys of the local area.

#### **Demographic Questions: Surveying The Local Community For Children And Young People With Special Educational Needs**

One of our first tasks was to construct a 'Referral Form' on which useful information might be recorded either by ourselves during the survey or by individuals wishing to refer potential students to the Engela Training Centre as a whole.



Working with other Engela Training Centre colleagues we were able to consider what further information, in addition to the obviously basic information such as name, age, 'address', and so forth, might prove helpful. My colleagues suggested that we needed to be careful to avoid our efforts leading to families withdrawing their children from local schools in order to attend the Engela Training Centre or take part in our proposed programme. Consequently, one of the questions on the referral form asked families to indicate whether the person referred had or was attending school. Other simple questions on the form included whether the referred person could see, hear, walk unaided, speak or understand what was spoken to them. Again, these were all designed to provide some indication of both the strengths and the level of difficulty of the referred person and also whether the referred person might be included in any one of the three Engela Training Centre departments. During these planning meetings, we also decided to produce a simple leaflet which would accompany the referral form and described the service that the Engela Training Centre as a whole and Department Three in particular planned to offer.

I also had some apprehensions about the potential damaging effects that the survey might have. I was particularly worried that as we could not easily gauge the size of response to the survey, we risked being overwhelmed from the number of calls for our service. I was also mindful that the district around Engela in which we proposed to start the survey had, since Namibia's independence, been the focus of many surveys in relation to health, education and occupational questions. One of the potential consequences of 'over-surveying' is that surveys begin to annoy families, particularly if they raise expectations which are subsequently not fulfilled (Saunders and Miles, 1990; Zinkin, 1995).

With the help of the local knowledge of Engela Training Centre colleagues, we were able to draw up a list of ten parish offices which we felt served communities which were sufficiently accessible to us from Department Three. Essentially the parishes chosen were those immediately around the mission of Engela, those to which colleagues might either walk to or use the local mini-bus public transport system which provided a regular and frequent service along the main (and only) tarred road, and return within working hours. These offices were located in a catchment area of approximately 20 kilometres in width and 60 kilometres in length (to Ondangwa in the South to which the ELCIN



Rehabilitation Centre CBR programme extended) that is, an area of 1200 square kilometres.

The 1991 Namibian census suggested that the population of the central Oshana region, which included our referral area, had approximately 100 people per square kilometre (Namibian Institute for Social and Economic Research (NISER), 1992), although this figure reduced to approximately 11 people per square kilometre further away from the major centres and the central highway either side of which we had targetted to provide support. If these figures were correct, we could expect up to 120,000 people to live within this area of which, according to often quoted United Nations disability figures of ten percent (UNICEF, 1981a), some 12,000 might be considered disabled. Indeed, surveys in various other African countries have even suggested that the figure may be higher, with between fifteen to twenty-five percent of the population being classed as disabled (O'Toole, 1991). Even if we were to consider the lower estimates of disability offered by other sources (e.g. Helander, 1992, who proposed a figure for moderate or severe disability at 5.2%) as an inflated figure, and were to adopt a more conservative two percent, this would suggest that some 2,400 people with disabilities might be found within this region. Of this number, some fifty percent would most likely be less than 15 years of age (NISER, 1992). If all of these figures were accurate estimates, then we might expect there to be over 1,000 children with moderate to severe disabilities within our proposed area of operation, of which a substantial number could be expected to have severe learning difficulties.

Interestingly, before we began to conduct the initial survey, I was also able to discuss with the whole of the Engela Training Centre staff if they personally knew of any children from their home districts around Engela who we might support within the Department. Initially this had not led to any children being identified. On reflection, I think that this response, or lack of it, may have been a measure of my colleagues' uncertainty about me at that time and the nature of the proposed programme. There may have also been a host of other issues, relating to notions of family privacy locally, that had caused these discussions to be less helpful than I had hoped. As it was, I found that at a later date, when the Engela Portage Programme was more established and understood locally, the same Engela Training Centre colleagues, who were unable from their local knowledge to identify children who had learning difficulties, were much more



forthcoming in suggesting the names of such children. I have also wondered whether, in combination with the level of trust that I had yet to establish, their initial reticence may have stemmed from the effects of the military occupation and prolonged war that local families had experienced. This could have made them suspicious of conveying information, particularly to a foreign stranger, about their neighbouring families.

The first step of the survey process consisted of our personally delivering the newly constructed referral forms, together with a booklet describing the Department to each of several identified local parish offices. This included an accompanying letter of explanation that suggested a date for us to visit the parish to collect any completed forms. Each subsequent visit to the parishes generally entailed meeting again with the pastor and reiterating and discussing the aims of the survey and the changes planned for Department Three. The subsequent visits revealed, in the main, a rather disappointing response with, in most parishes, few of the forms being completed. Nevertheless most of the pastors assured us that there were indeed children with severe learning difficulties in their parishes and that they would call upon their congregations to help with the survey process. I noted in my report to ELCIN in November 1992 that after a further period of approximately five weeks we were still waiting to receive even one response to our initial survey.

From November 1992, given the poor response from parish offices, we decided to include local health clinics as referral sources. Again following discussion with colleagues at the Engela Training Centre, clinics within our target area were identified and visited, informational booklets and referral forms provided and return visits to collect the completed forms arranged. This seemed to prove much more successful and, from November 1992 to March 1993, my report to ELCIN dated March 1993 indicated that we had received a total of thirty-five completed referral forms, although by this time some of the parish offices had also eventually provided a little more information. From all of these referral sources, fourteen appeared to describe children who seemed to have difficulties that Department Three might be able to support and some of the remainder of the referrals were passed to the other two departments at the Engela Training Centre to consider for inclusion on their courses. This fairly successful aspect of the initial survey also interested colleagues from the other two departments, as many of their own students were drawn from a small pool of students who repeatedly attended courses at the Engela



Training Centre. Consequently, from March 1993 when conducting further surveys based at local clinics, we were able to work with the enthusiastic support of many of the other members of the Engela Training Centre staff.

The information that we received from our initial surveys and other referrals suggested that the referring sources understood disability in very broad terms. The referrals included the details of children who were currently attending school but with academic problems through to elderly men and women who had memory and sensory difficulties. This, of course, was rather what we had expected. What we had not expected was the dearth of referrals of very young children and we were perplexed that few of the children referred at that time were aged below 4 years. As Portage, within the United Kingdom, was primarily designed to support pre-school children with special needs, this caused me some concerns and it was to have implications for the later shape that the home-based teaching programme took.

With the arrival of completed referral forms, we needed to begin to address the central question of to whom should we offer the planned home-based support programme. Should we simply accept all referrals? Should we work with adults including elderly adults who had also been among those referred to the Department? What range of learning difficulties should we focus upon? The Department at the time that I arrived had few formal criteria for whom to accept, as was clear from the diverse range of students who then attended the Department. In terms of whom the Department should now support, this required some further lengthy discussions. Overall, the staff felt that we should aim to support children and young people up to 18 years of age and, as those children and young people who had been referred appeared to have very significant and sometimes very complex multiple difficulties, it was also decided that the Programme should be targeted towards them. That is, children and young people who could not be accepted into their local school because of their severe learning difficulties.

The lack of younger children being referred to the Department at that time clearly had some major implications for the home-based teaching programme, such as the range of skills that the Portage Visitors might expect families to teach. Perhaps this serves to further demonstrate how a degree of pragmatism and flexibility in expectations is needed



by Western experts and also an acknowledgement of the shortcomings of too much pre-planning.

### *Considering Family And Cultural Questions Related To Home Based Teaching*

Working with and teaching colleagues within a residential facility, where they have had at least some, albeit limited training and exposure to Western world views, such as notions of childhood and education, is one thing. However, attempting to work with families in their own homes and who have had less contact with or have less to gain by acceding to a Western 'expert' and to Western ideas, is quite another. There are a host of substantial practical and cultural issues that might have potentially undermined our attempts to successfully implement a Western inspired home-based teaching programme with families locally.

Others have also raised questions about the specific relevance of home-based teaching. Momm and Konig (1989) and Finkenflugel, et al. (1996) suggested that local and traditional beliefs about disability had to be understood before an effective community based programme could be implemented in developing countries. Likewise, Marfo and Kysela, (1981) advised a number of general questions which they argued may be directly relevant to the establishment of a home-based teaching programme in Africa. Essentially, their questions were concerned with the nature of the material, social and cultural conditions that any programme may need to consider. They questioned whether basic needs such as hunger and unemployment in some African societies might be so pressing that the difficulties faced by families relating to the development of children with special needs become overshadowed. They also raised concerns as to whether the structure and child rearing practices of some African families and societies really represented an ideal context for a home-based programme to operate within. Finally, they wondered what were the unique needs and circumstances of the receiving African societies that a home-based teaching programme might need to consider and to be responsive to.

When considering the views and related questions put forward by Marfo and Kysela, I think there is a great need to be cautious about making generalisations of the nature of African society. Given the diverse nature of the African continent with its vast range of cultures, historical, political and economic circumstances, I believe that Portage experts



would do well to be wary of making assumptions about shared African values, African beliefs and African practices. For example, Serpell (1993) noted the marked differences between the educational system and experiences of children living in an urban African environment even within one country, Zambia, with those of children living in more remote rural areas. Indeed, Serpell argued for the notion of an “eco-cultural niche of child development” (p. 24) where education (including special education) needed to be rooted directly within the context and culture of the people it immediately intended to serve.

Within the West, the types of fundamental constraints upon families suggested by Marfo and Kysela (1981) are rarely raised although issues such as unemployment and threats of eviction have occasionally all been seen as effecting the ability of families to systematically take part in Portage. Rather it seems that a greater emphasis has been placed upon questions regarding the emotional aspects of family life, such as considering whether the family of the child accept or deny the level of the child’s difficulties. Early research of this nature conducted by Pugh, (1981) for example, has indicated that parents may first need to resolve their personal difficulties before they can take an active part in Portage. However, there seems to be very little research addressing the emotional state of families and their ability to participate in home-based teaching in African societies.

During the review of the Portage literature I referred to the research studies by Bardsley and Perkins (1985) and O’Toole (1989) which also raised questions related to family ‘skills’ or beliefs the researchers judged necessary for the successful application of the Portage programme. At the time we undertook our early special needs surveys within northern Namibia, I hoped that through the information we gathered and through working with the first few local families, we might also be able to address similar questions as to whether the families had the life styles and understanding that would make Portage relevant to their needs. Likewise, I also felt that it would be important to try and ascertain what, if any, teaching of children already occurred within the families. At that early stage I also had little understanding of the particular circumstances in which children with special needs lived within their families.

As seems to have preoccupied many Portage experts, I also had specific concerns with what might be called the relevance of the ‘mechanics’ of the Portage programme we



envisaged operating locally. As I have described, Portage relies on clear planning, recording and ongoing evaluation monitored through the use of written records. Consequently, I was also keen to try and determine as early as possible whether local families were able to appreciate and to apply the behavioural teaching techniques which are central to the Portage teaching process, such as the strategic use of rewards and reinforcement. Given the reported low rate of literacy locally, I was also concerned to determine whether local families would be able to keep sufficiently clear records of their teaching progress.

### Addressing Cultural and Practical Questions And Collecting Information

I was fascinated to read O'Toole's detailed accounts of how these questions were addressed as part of his preparation for the CBR programme in Guyana (O'Toole, 1988, 1989). O'Toole (1988) criticised the adoption of CBR approaches based upon *a priori* grounds and called rather for an empirical basis for establishing the relevance of such programmes. In his attempts to address his concerns, O'Toole (1988, p. 325) implemented his own research project to focus upon such questions about "the implementation process, the dynamics of innovation and the limitations of the CBR approach".

O'Toole's (1988) initial inquiry was based significantly upon pre and post teaching tests of children's learning gains (as measured by the use of Portage materials and the Griffiths' assessment) together with, "a battery of questionnaires and interview schedules" (p. 327), including the Malaise Inventory, to assess the level of, "emotional disturbance in mothers" (p. 327); self-rating scales; child-rating scales; and a sentence completion questionnaire to assess "initial reaction; ability to share feelings; understanding of causation: attitude to the future: and reactions of the community" (p. 327-328). O'Toole clearly was concerned to establish a 'scientific' approach to the development of the subsequent programme and to measure its effectiveness. However, within the reports (O'Toole, 1988, 1989), there is less information about the social dynamics, negotiations, compromises and problems that surely must have shaped the development of a project of this nature. Nor are the wider beliefs, views and knowledge of the trained volunteers and teachers who implemented the programme significantly alluded to. Unfortunately, I believe that overlooking these relational questions can



convey the impression within research reports that local colleagues are no more than passive programme delivery 'devices'.

Also, as I found from my own experience with colleagues in Namibia, the use of questionnaires and the nature of the questions we might ask families and others can readily influence the answers they elicit. For example, respondents may attempt to shape their answers so that they are in-line with what they believe the questions infer, or what they believe the questioner wishes to hear. As such, the use of a battery of Western inspired statistical tests and information gather techniques do not necessarily imply that a programme's development is any more valid or pragmatically rigorous.

In contrast to O'Toole, as I shall describe below, I found that a less 'scientific' approach, one that involved the use of a pilot programme, together with ascertaining the views of local colleagues, the more practical option within northern Namibia. At the Engela Training Centre we had to deal with very limited resources, both materially and in terms of time, while having to simultaneously provide an ongoing service within Department Three. We decided therefore to begin to develop the Portage programme so that it as far as possible accorded with the local circumstances that we encountered. This included ensuring that rather than over investing all of our energies in any one direction, a number of possible alternative options remained open concerning the future direction of the Department. Given the range of expectations of myself and my colleagues, I realised that I would need to strive for a kind of pragmatic compromise, rather than to wholly disrupt the Department by pursuing my own vision, and thereby risk leaving my colleagues, at the end of my contract, with a programme that might have had little relevance locally and of which they had little ownership. Also, prior to the use of a pilot programme I was able to gain information from the most valuable and obvious of sources, my colleagues at the Engela Training Centre themselves, as, after all, they were the local experts. Indeed, all the Engela Training Centre staff lived in the local community and most of them were parents themselves.

At this stage I also think it is useful to reflect on how the nature of the questions asked by O'Toole (1988) and also Marfo and Kysela (1981) as well as those which preoccupied myself at that time, were all very much 'first-order' questions. That is, they were all questions asked by the expert about the local community, outside of which the



expert is assumed to stand, but which they make judgements upon. There is no sense in the reports that the expert themselves might also have a responsibility to ask similar questions about their own cultural understanding regarding disability issues; how the expert's own cultural understanding related to disability developed or how it is sustained. Nor is there any suggestion in these reports that the beliefs of the expert, those who will be acting upon the answers they receive about local views regarding disability and the local community and culture, may have any implications for how they, the experts, interpret the responses they receive and subsequently act. None of these reports consider a second-order perspective in which they, the experts, are also inevitably and unavoidably implicated in the 'system' composed of themselves and those 'under study'. It is this first-order expert stance which encourages a technical perspective of expert involvement and, I believe, avoids the ethical concerns which the second-order position raises regarding questions of relationships and coping with difference. So, while I believe first-order questions about cultural beliefs and practices are relevant questions for experts to ask, they are not sufficient questions on their own as I shall discuss further in Chapter V.

### *Discussion With Colleagues*

Initially, discussion with my colleagues was not wholly encouraging. They suggested that based upon their local knowledge they expected little teaching to take place within families and that some families might at first even find the suggestion of teaching their children themselves very odd. Colleagues also largely supposed that, if given the choice, most families would prefer a residential option for their children. They felt that while some families might be able to take part in a behavioural programme such as Portage others might have difficulty, due to factors such as their poor literacy, and that some families might find creating the necessary time to teach during harvest periods difficult.

However, when we considered how local children might learn to dress themselves, take part in family routines, help out around the home, learn the names of animals and of their relatives, and so on, colleagues acknowledged that at this informal level, some teaching probably did take place within families. Several of my colleagues described how, particularly for very young children, adults often played a range of games similar to peek-a-boo to interact with children, but they felt that once children were able to walk then their playful contact with adults was much less. At that stage it was suggested the



relationship between adult and child became one in which the children were expected to quickly become independent and responsible by contributing to the demands of running the household, such as fetching water and fuel, tending the cattle or other children. From colleagues' descriptions it seemed that once children were able to walk independently, then children tended to play with and to be responsible for the management of each other, such as by overseeing younger children.

Therefore, following discussions with my colleagues, I was still unable to address with confidence the key questions that I had acknowledged as important for the successful application of a home based teaching programme. However, I was at least able to conclude, albeit tentatively, that it seemed that while colleagues were unsure about some issues such as whether Portage would be wholly welcomed and would be feasible locally, they did not express outright scepticism or suggest that Portage was definitely not a viable option. Again, this sense of inconclusiveness and uncertainty, which characterised many of the key decision steps that we as a Department were to take throughout my stay at the Engela Training Centre, had to be tolerated as the best we could reasonably and practically achieve. However, my three departmental colleagues, who were to be the key implementers of the intended pilot Portage Programme, expressed sufficient enthusiasm to assure me that we should continue. Clearly, without their collaboration in the proposed pilot programme and also the sense that they had some faith in the viability of such a programme, the pilot would have not been feasible.

Also, as with Bardsley and Perkins (1985), I was not convinced that families had to have, at least initially, an understanding about such issues as 'stages' of child development, the importance of teaching, and so forth. Nevertheless families clearly had to be convinced or open to persuasion that they could effectively teach their child, if indeed they so wished, and they had to have the inclination and the time to be able to try to teach.

One of the many advantages of my being based at the Engela Training Centre was that most colleagues had not had any great deal of training concerning special needs and were not well educated in the formal sense and so were largely representative of the wider community. While most had attended their local primary schools, few had any formal educational qualifications. Consequently, I had some greater confidence, following my colleagues' general acceptance of the behavioural and other aspects of the Portage



Programme together with their interest and ability to run similar teaching programmes within the Department, that families in the wider community might also prove generally accepting.

Alongside this question about whether families would and could viably use the Portage approach was a further question mentioned above about the circumstances of children with special needs within their own homes. Likewise, I felt that it would prove helpful to know what were the practical conditions that children with special needs lived in. Were these children accepted as part of the whole family? Did they take part in family events? Or were they marginalised within their families? If children with special needs were not included in general family life, would families be motivated to spend time teaching their children? If they were already included as part of the family, did they need a home teaching programme anyway?

Again, in order to gain some insight into these questions, I first approached my colleagues who reported a range of views. As I have mentioned above, many said that they were unaware of there being many children in their own home communities who might have severe learning difficulties of the kind that Department Three currently worked with, although children with sensory problems were generally known about. Others mentioned seeing children such as those with Down's Syndrome playing near their local shops. Still other colleagues felt that some families probably kept children with severe learning difficulties well hidden from their neighbours and the local community, and that little was known about how these children were catered for. However, it seemed from my own experience locally within Namibia that, despite earlier stories from some colleagues of how many children who were severely disabled were kept 'hidden away' and treated poorly, this did not seem to be wholly or even mainly the case in those families with whom we came into contact.

It is possible that this uncertainty about and ambiguity of information concerning local circumstances may also have reflected the lack of liaison between the Engela Training Centre staff and the families of the children who were presently attending the Department. Given both the mixed and sometimes contradictory nature of the information received from my colleagues, it seemed at the time that we would only be able to fully address these questions by increasing our involvement with local families.



Consequently, as we had already effectively expected, our next step was to work with a few of those families we knew of locally.

#### *Providing A Basic Portage Training Workshop For Colleagues*

In January, at the beginning of the 1993 Term, the arrival of the returning students for the second residential course was delayed for one week. This was to enable both my counterpart and myself the opportunity to provide an in-service training workshop for my colleagues within Department Three, the House-mothers and several other interested colleagues from the other departments at the Engela Training Centre. The course covered all aspects of the basic Portage model and proceeded through a series of presentations, mini-workshops and group and individual exercises using the translated and adapted Portage materials. This experience also provided my counterpart, in particular, with the opportunity to both revise and consolidate her understanding about Portage and to gain teaching experience through working with other colleagues. I was pleased to note that, in contrast to my very early experiences in providing in-service training to other CBR and Health staff locally, as part of the ELCIN Rehabilitation Centre training programme, the Engela staff appeared to be keen to participate in the experiential aspects of the workshop and at times some lively debate took place about the Portage checklist items and the behavioural teaching process. I also noted that my colleagues were prepared to be far more critical and questioning, which I attributed to them becoming accustomed to working alongside me and to the degree of trust and rapport that we had managed to establish. Again, this seemed to emphasise to me how important establishing interpersonal relationships are to the practice of Portage experts.

The training workshop also allowed us as a whole staff to further assess the utility of the adapted Portage checklists and activity charts and the notion of teaching using behavioural techniques. I was also pleased that the House-mothers in particular, many of whom had the least degree of education but the widest experience of caring for children, thought positively about the whole programme.

#### **3.5.4. Conducting The Pilot Study**

Following that intensive one-week Portage training workshop we began to operate a pilot Portage programme. Initially, both of the two departmental assistants, now Portage



Visitors, were accompanied on their early home visits by my counterpart, for the first two weekly visits but beyond if it was felt necessary.

As part of the pilot Portage Programme, from January 1993, we were able to identify two children who had previously attended the Department, that lived locally and who, with the agreement of their families, we were able to support in their own homes. We were also able to include a further six families as part of the pilot, with these additional families being identified locally through our initial survey of the area. A maximum of eight families for the pilot was chosen as, with our staffing levels at that time, this appeared to be the most of whom we could adequately cater, while simultaneously also supporting the group of eight students who remained on the residential course within the Department and while we still continued to conduct the special needs surveying of the region.

As the residential course for the eight students had been organised to finish in March 1993, in line with the other courses operating within Departments One and Two, this effectively provided eleven weeks for the pilot study. After this period we realised we would need to consider whether to either extend the pilot and offer further residential courses if we felt the results from the pilot were not encouraging, or, as we hoped, devote all of our efforts to home-based teaching through the Portage programme. This latter option depended of course upon the feedback from the pilot families as well as upon our views that the pilot had progressed sufficiently well. On reflection, I can appreciate we were fortunate in that we had relatively few restrictions upon the course of action we could choose to follow, although I felt aware at that time that we needed to be perceived as gainfully employed by the ELCIN Rehabilitation Centre and ELCIN administration who were funding the Department. Since the pilot consisted of our support of eight students, which was certainly on par with the number of students who attended the courses offered by each of the other two departments at the Engela Training Centre, I was at least confident that we could readily argue that we were offering a comparable level of support. Indeed at that time our main source of difficulty stemmed from having to juggle our time between the students on the residential course and the pilot. In effect we were actually supporting a total of sixteen students, which was well above the numbers who were then attending either of the other two departments in the Centre.



In the event, by the end of March 1993, we felt sufficiently confident that the support that we had been providing to the eight families in the pilot programme was proving to be both feasible and successful. This was as judged by feedback we had received through the positive response and comments from the children's families, our own Portage records of the children's progress and of course from my Departmental colleagues themselves.

### *Information And Experiences Gained Through The Pilot Study*

The primary aim of the pilot programme had been to allow us to begin to directly address, by the most practical of means, key questions concerning the feasibility of implementing a Portage home-based teaching programme to families in northern Namibia. Clearly, from such a relatively short pilot we could expect at best only partial answers to these questions, although this experience did provide sufficient initial information on which to base our later practice. Again I think that this demonstrates how in practice the pragmatics of the context, such as the relative short term of my contract and the self-imposed imperative to 'get a programme up and running', reflect the realities in which practitioners, away from straightforward academic and research concerns, have to function. This practitioner research approach necessarily entails the tolerance of a great deal of uncertainty and risk, and demonstrates how many practitioners have to frequently rely, in addition to incomplete information, upon predominantly subjective 'gut-feelings' and a degree of blind faith, which can characterises much of our expert practice.

Prior to the pilot I had wondered what, if any, teaching of local children with special needs already took place within their homes. It seemed that most of the children, according to the information we gathered from discussion with their families, received very little in the way of formal teaching. This was consistent with the views of colleagues within the Engela Training Centre who I had earlier consulted about family circumstances locally. However, it was clear that some teaching did take place, although it was not necessarily recognised as such. Some children who took part in the pilot clearly had learned skills either incidentally or through some form of instruction previous to the pilot. For example, several children had learned to sit, to eat with their fingers, respond to their names being called and occasionally, for those who were more mobile,



they had been taught how to help at some level with certain household chores such as to collect firewood.

I had also been concerned with the effects of a home-based programme in terms of the demands it might place upon the children's families. If, as Marfo and Kysela, (1981) suggested some African families might, due to their poverty, be under such pressure to meet basic survival needs that they were unable to take part in the home-visiting programme, then this would have had serious consequences for the type of support that we could have hoped to provide to them. However, it seemed from the pilot information that, although all of the families were largely dependent upon subsistence farming at the time of the pilot, there were few if any major survival issues which were so pressing as to undermine their interest in the pilot programme or their ability to fully take part in the pilot.

Of course, there were other aspects of the daily lives of families that could have also represented a barrier to their participation in a home-based teaching programme. Another concern that I had was that in most traditional northern Namibia homes, the daily chores that family members necessarily had to complete could be so demanding of their time that this might have undermined their ability to take time out to teach their children. For example, water may have to be fetched from several kilometres away and this journey made several times each day. Fuel for cooking in many areas was scarce and this necessitated family members foraging wide. Such daily activities potentially competed with the available time to teach children. Nevertheless, all eight of the families involved in the pilot fulfilled their agreed part of our verbal contract to teach their children during the eleven weeks of the pilot. Indeed, most of these families continued to take part in the Engela Portage Programme beyond the pilot for at least a further two years.

As I have mentioned above, within the West it is often the emotional issues facing families which are foregrounded as presenting obstacles for parents to participate fully in Portage, such as their ability to come to terms with their child's disability. Unfortunately these issues were not something that I was able to gain any great insight into locally, certainly at the time of the pilot. I simply did not have that type of rapport with families or my colleagues, or indeed the cultural understanding that enabled me to do this.



Nevertheless, whether such emotional issues were or were not present, they did not appear to undermine the participation of those families who took part within the pilot programme.

Overall we found that the families involved with the pilot, while all living within rural homesteads where the prime source of their subsistence stemmed from the fields that they cultivated and the cattle and poultry that they owned, represented a very diverse group. This diversity could be seen in terms of their educational background, their status in the local community, the size and composition of their families, their wealth, and so forth. Despite this diversity, it appeared that all of the families were able to take part in the pilot Portage programme.

Accepting that the families were able to participate in the pilot, a further question had related to whether they were also willing to take part. We were pleased to note that each of the eight families who were approached to take part in the pilot Programme, following an explanation of the service that we hoped to offer them, opted to be included. This seemed to suggest, at least initially, that they felt that Portage was something that might meet a need they recognised or at the very least might have something beneficial to offer them.

We had also been concerned, that even if families were both physically able and willing to take part, whether they would also be capable of following the Portage approach. In effect, we found during the pilot that the ability of families to carry out the agreed teaching procedures, and to record the results of their teaching, varied widely. As a result we began to redesign some of the Engela Portage Programme materials, particularly the Activity Chart to accommodate their needs.

Obviously the few weeks that our pilot Portage programme had been in operation was not a sufficient amount of time in which to judge whether Portage was 'effective'. Certainly, even by my own early notions held at that time of what 'effective' might entail, which primarily focused upon 'outcome' measurements, I was able to recognise that we would need to consider the operation of the Programme over a much more extended period of time, with a larger number of families and with a wider range of children with difficulties to be able to answer that question. I also recognised that we



would need to operate the Programme over a longer period in order to determine whether my colleagues could sustain such a programme without my input and also whether the Programme sufficiently catered for all the diverse needs of families and children it would be called upon to support.

Another concern I had was whether my colleagues in the Department were, apart from the encouragement that they had received from the families they visited, also happy about the changes to their roles and the Programme in general. Until the implementation of the pilot, most of my departmental colleagues had worked for several years within the institutional confines of the Engela Training Centre supporting residential students. During this period in the Centre, they had grown accustomed to the typical features of institutional life with a visible hierarchy of responsibility within each department, set work routines, repeated patterns of work punctuated by staff breaks. In contrast, during those days on which colleagues visited the families involved with the pilot, they generally left the Centre early in the morning and returned at the end of the working day. While out in the community, they spent a considerable portion of this time alone and waiting for or travelling on the local minibuses, or walking through the bush during the heat of the day to family homes. Physically this was much more demanding than the work to which they had been accustomed at the Engela Training Centre. Their day lacked the familiar structure of breaks and routine teaching activities and, separated from the Centre, they also lost the social company and support of their colleagues. However, through discussion with my colleagues about the pilot and their roles, I was relieved to find that they not only accepted the opportunity to trial a change in their work patterns, but also felt generally positive about the changes, appearing to enjoy the greater autonomy that this gave them.

#### *Further Information From The Pilot Portage Programme*

In addition to providing information about whether local families were able, willing and capable of receiving support from a home-visiting programme, and whether we were able to adequately provide them with a service, the pilot study provided further useful information, which we were able to use to shape the later Engela Portage Programme.



### *Local Beliefs About Disability*

Although my own involvement with local colleagues and families was not an ‘anthropological’ study into the beliefs that local people held concerning disability and other relevant issues, clearly some awareness of the meaning that people attached to these concepts and some sensitivity on my part to local views was necessary. An understanding of these beliefs was important because of the possible implications of such knowledge that might either undermine or alternatively strengthen our efforts to introduce home-based teaching.

My understanding about local meanings of disability stemmed primarily from my conversations with colleagues at the Engela Training Centre and ELCIN Rehabilitation Centre, together with later discussion with some of the families with whom we began to work. Other sources of information concerning cultural beliefs were the very few reports that I came across while in Namibia, such as the Review report (ELCIN, 1992), which described the supposed negative traditional views that local people held towards people with disabilities. Although I shall refer to this report again in Chapter V when I consider the implications of cultural beliefs for expert practice in greater detail, in summary, I can report that to the frustration of the authors, local people, it claimed, were too concerned with questions about ‘why’ an individual was disabled. I felt that there might have been possible implications for home teaching, if such local beliefs as to ‘why’ a person was disabled undermined any consideration or possibility for changing their conditions, such as believing that the disability was justified. Again, following discussion with my colleagues, it was suggested that this was unlikely to present a particular or significant problem for our intended home-based programme.

However, it is also true to say that families did ask us ‘why’ their children were disabled and our usual replies that we did not know, but that some disabilities might be related to medical conditions and other causes simply not known, seemed to suffice. In no case that I can recall were we aware of families blaming a particular individual or viewing the disability of a child as representing retribution for some form of personal or family cultural transgression. This is not to say that this did not occur, simply that I was not aware of it and it did not seem to interfere with our development of the Programme to my knowledge. Nevertheless, I was interested to note that beliefs about the supernatural



were widespread but that it was very difficult to discuss these with even close colleagues, who seemed to avoid the topic when raised.

### *Staff Participation*

A key component of Portage entails regular, usually weekly, group supervision meetings between the Portage Supervisor and the Portage Visitors. As I have described, during these meetings the Portage Visitors individually discuss each of the families that they have visited that week. The conversation focuses upon the outcome of the previous week's teaching by the family, the new teaching target or any amendments to the previous teaching targets, and a discussion of any problems or other issues that may have arisen. As I noted, this format provides an ideal opportunity for group problem solving, as well as representing ongoing training of all involved, including the supervisor, a role that I occupied at that early stage.

However, there was another important aspect to the structure of these regular meetings that I had not envisaged before the pilot and which became increasingly apparent as we introduced the Programme on a wider basis. I felt that the regular supervision meetings were extremely useful in also effecting change to how my 'expert' role was understood by my colleagues, certainly from how it had been previously constructed by my Head of Department status. As all of my departmental colleagues were effectively gaining greater experience of the individual families that they visited, I think that gradually this also provided them with a greater sense of their own authority. Equally, as they gained experience of the families and of Portage generally, the opportunities for open debate during the meetings allowed them to contribute with greater equity. Indeed, what was later very clear, from the outset of the introduction of the Engela Portage Programme following the pilot, was that we were all equally learning as we proceeded and that I was not particularly any more qualified to provide solutions to local family difficulties encountered by the Portage Visitors than they were. I think my colleagues realised that, while I might have initially had greater theoretical knowledge of Portage than they had, they were gradually becoming 'experts' in their own right. As such, a more egalitarian state of affairs seemed to arise, certainly as I perceived it, and I felt that my colleagues became much more confident in offering criticisms and voicing their opinions.



### *The Portage Structure*

Regarding my colleagues' acceptance of Portage, I was also struck even at the early pilot stage that the structure of Portage appeared to provide the Portage Visitors with a helpful framework in which to approach and advise families. Many of the children that the Portage Visitors were supporting within their families had very complex and significant difficulties, which would have challenged the skills of competent Western professionals, particularly as there were no other supporting agencies that could be called upon in rural Namibia. To this extent it appeared that what might be viewed as the highly structured and the rather prescriptive aspects of Portage, provided a helpful prop from which colleagues could launch their efforts to help families. When working with families the Portage Visitors had been well trained in a series of discrete practice steps that they could take to both define the problem, to target their initial efforts and to structure their advice to the family member teaching the child. It also seemed from discussion during the supervision sessions that the sight of the Portage materials provided some comfort and reassurance to the families that we visited perhaps by signalling our 'expert' status.

### *Improvements to the Portage Materials*

The main purposes of the Portage Checklist were to provide both a base-line assessment of children's skills and to offer a potential curriculum for teaching. However it was also apparent from the pilot, that in Namibia the use of the Checklist seemed to provide a further helpful purpose, that of sensitising the children's families to the type of skills we hoped they would teach their children. The value of the Checklist was therefore that it also provided insight for the families we worked with into 'what we were about', concerning the type and level of teaching with which we hoped to support them.

Also, I believe the break-down of teaching objectives into small, sequenced steps conceptually introduced families to the notion of sequenced development (if they had not been aware of this before). Additionally, we found that conducting an assessment in a rural Namibian home usually attracted quite a lot of attention from the wider family of the child and it was typically the case that four or five members of the family, adults and children alike, would often contribute to the assessment. Again, this proved to be very positive, in that I believe it may have helped the child's wider family to understand about the home-visiting programme that we hoped to introduce and thereby, as often proved the case, enable others within the family to have either a role in teaching the child if the



need arose, or to be able to support the family member who was designated to teach. This experience of working with families also allowed us to refine the Checklist so that it was more relevant to the needs of local children and less time consuming to complete.

During the pilot, the Activity Chart that we used remained effectively the same as the original Portage Chart. The purposes of the Activity Chart are various. It records the teaching target for the week's teaching written in clear 'objective' terms. It contains the verbatim teaching instruction, including correction instructions the family member will use to teach. It lists any rewards, prompts or materials that will be used. Following each teaching session it is also used to record the level of achievement (successes) in terms of the target that it is expected the child will be reasonably able to reach. Finally, it also serves as a graphical record of each daily teaching session of each of the seven days.

However, it became clear during the course of the pilot that most family members found the recording of teaching sessions and outcomes difficult. Also, as many of the families were illiterate, the series of written teaching instructions recorded on the Chart did not represent for them a helpful aide-memoire. Nevertheless, discussion with my colleagues suggested that they found the Activity Chart helpful, particularly for the process of first clearly identifying a teaching target and then setting out the series of teaching instructions. It was as if the use of the Chart on its clipboard, and the actual recording of instruction collaboratively with the family member who was to teach the child, lent them some further professional credibility and also a sense of formality to their visit, as well as providing a helpful focus for their work with the families. Also by involving the family in the process of completing the Activity Chart, from the description of the Portage Visitors, it was as if this added further weight or 'a sense of contract' to the agreement on the part of the family to continue with the teaching. Consequently, during the course of 1993 and the operation of the wider Engela Portage Programme, we began to devise an alternative and more user-friendlier format for the Chart.

### *The Experiences Of Children Generally Within Their Homes*

From the brief visits to family homes that we made during the surveys, and from the repeated visits to the homes of those families who took part in the pilot study, I was able to gain a better understanding of the range of child-rearing practices locally. I also suspect that these experiences further enlightened my colleagues. From an initial



perspective there were some concerns that many families' circumstances might not match those that would be considered necessary for Portage. Traditionally, Portage appears to assume that teaching will take place in a family environment, where motivated parents will follow the advice of the Portage Visitor, by regularly providing short, stimulating teaching sessions daily and that these sessions will be clearly recorded for later evaluation and future planning of the teaching process. Yet it seemed that, in many of the homes that we visited, the child-rearing practice and circumstances were quite different from those that we can expect within the West and certainly from my own experiences with working with families within the United Kingdom.

For example, as my colleagues had previously suggested, we found that locally within northern Namibia once children were able to walk they appeared to fall under the responsibility and supervision of their siblings or perhaps a young girl acting as home help. Contact with adults became less frequent. These interpretations seem similar to those of LeVine and LeVine (1981), who also noted that children from the Gusii ethnic group in East African had less contact with their parents after 3 months of age and that this steadily declined further as the child aged.

As my colleagues also explained, and as I noted during visits as part of the pilot, in most traditional homes young children were reared in a fairly permissive manner, where their needs were met on demand and that this typically continued until they become sufficiently independent, after which they were then expected to adhere to quite strict behavioural expectations and duties. For those children with the most severe special needs, this permissiveness persisted, although if, as frequently was the case, they did not make demands, they were usually left alone for long periods during the day.

A similar picture of local family life was also suggested by the participants who attended a workshop we held within Department Three at Engela for Rehabilitation students from Windhoek in 1994 who were training as Government CBR co-ordinators. Most of the students who participated in the workshop were recruited from the north of Namibia, having been brought up in traditional rural homes. In a later training session upon their return to Windhoek they focused upon the theme 'Children and Culture'. Their Belgium tutor, Ludo Vahees (1994, p. 2) reported the following feedback from the students to me:



“stimulation - activities like we know in the Western Culture are (almost) non-existent...children are expected to help families in their daily activities: fetching water, collecting firewood, making fires, cooking, looking after cattle, working on the land, etc. ....in the earlier times as well as now there is (in rural areas) no play between the parents and the children, children play between their peers. Adolescents and adults do play but only between their age groups. They do not have lots of children's games.... parents in rural areas do not have time to play with their children, there is too much work to do”.

Interestingly, had I conducted a more 'scientific' preliminary investigation into the attitudes and behaviour of families to children, using a range of scales and behavioural sampling techniques similar to O'Toole (1988), this later information may have seriously discouraged me from considering home-based teaching as a viable option. Among many other things, I think that the experience of the pilot study taught us that there were many myths and contrary opinions about what local families could do locally and that generalisations can be very misleading. Equally important is that, while the traditional lifestyle within local families may initially appear to discourage a particular type of intervention, this does not necessarily mean that families cannot be adaptive in their behaviour toward their children and follow unfamiliar practices.

### *The Experiences Of Children With Special Needs Within Their Homes*

We encountered a wide range of circumstances, both in the conditions in which children with severe learning difficulties lived and the manner in which their families treated them. Most children were well cared for physically, such as being regularly cleaned and well fed. However, it appeared that many children with more severe levels of special needs took little part in active family life, certainly not to the degree that children without disabilities might be expected to. Often these children had most if not all of their needs taken care of, with little attempt by family members to try to teach them. It seemed that for such children, if their families felt that if they could complete a task for the child and that this involved less time, then the child was not taught or expected to be able to try to learn the task for themselves.

In many families we discovered that these children effectively spent most of their life separate from other family members, perhaps lying for long periods of the day and night within a hut. So it seemed that children with the most severe learning difficulties, although apparently part of the family and local community, often experienced a very different quality and pattern of interaction with other family members than children



without special needs. It was the realisation of this disparity between the experiences of children that was to have far reaching implications for how we later came to understand the primary focus of the Engela Portage Programme, and indeed on my own understanding of how the Portage framework might be re-conceived and utilised locally, as I shall describe below when I review the shifts in my understanding.

### **3.6. PERFORMING: The Engela Portage Programme In Operation**

By the end of March 1993, within Department Three we were in a position to be able to consider taking the next step of fully committing the Department's resources wholly to the home-based teaching approach. What I have referred to as the 'Performing' phase of my involvement with the Engela Portage Programme stemmed from March 1993 through to February 1995. February 1995 was also the date on which my contract ended and I left the Engela Training Centre to return to the United Kingdom, my contract having been extended for one further year from February 1994. This 'Performing' phase was characterised by activities that were all directed towards the extension of the Programme, both in terms of the number of families that we supported and the geographical area we served. This expansion took place at two levels. Firstly, through increasing the number of families that my departmental colleagues supported, which below I have called Phase One. Secondly, with our growing confidence in the apparent efficacy of the Programme, we planned to support families who lived much further away from the Engela Training Centre, with additional Portage Visitors working from their own homes, which I have called Phase Two.

#### **3.6.1. Expansion Of The Engela Portage Programme - Phase One**

Having made the decision to launch the Engela Portage Programme at the close of March 1993, we initially began with the eight families who had taken part in the pilot plus one further family that we had identified during our earlier special needs surveys. Although, by March 1993, we were aware of a number of families within our district who we had identified during these earlier surveys as willing to participate in the Programme, we realised that this number of families alone would not prove sufficient to justify the longer term substantial changes to the Department for which we were then hoping.



Concerns about Programme Costs and the Number of Families Supported

It was clear that supporting children in their own homes should prove far less expensive than providing residential courses at the Engela Training Centre. Although the salaries of the Portage Visitors remained the same as when they worked as class assistants and instructor within the Department, the Engela Portage Programme saved on the cost of employing three House-mothers and the daily catering costs for each student. Even ignoring the additional costs of utilities, maintenance, laundry staff, etc., that the running of the Engela Training Centre buildings and Department Three necessitated, we estimated that supporting children and their families in their own homes would cost approximately half as much as providing for the same number of students residentially within Department Three. However, working within the community we also had the additional cost of transportation. Obviously the further the Portage Visitors travelled and the more dispersed were the children's homes, the relatively more expensive the Engela Portage Programme became. Consequently, we were committed to Portage Visitors travelling on foot or using the local minibuses and, as later became a useful option, using bicycles as much as possible.

An awareness of the relative high costs of transportation also figured highly in our later special needs surveys of the region. Ideally, in order to keep costs as low as possible, we sought clusters of children, which enabled one Portage Visitor to visit several homes during one journey. In some respects the geographical position of the Engela mission was not ideal in that the Namibian - Angolan border was only 4 or 5 Kilometres to the north. This border represented a barrier to opportunities to provide a '360 degree' service to the families who lay to the north of the mission, thereby restricting the area that we could serve 'cost-efficiently'. Nevertheless, at that time we were convinced that we would find more than enough families within the region to which we had access, provided that we extended the scope of our special needs surveys.

In addition to costs per child, we were aware that we also needed to demonstrate that we could support a sufficient number of children and their families locally. At the time of my arrival, Department Three had been accommodating seventeen students. Initially, I felt that we would need to at least match this number in terms of the families and children that we were supporting locally, if we were to strengthen the conviction of others that the Engela Portage Programme was a viable option. With three Portage



Visitors I estimated that we might expect each visit would typically take between one to one and a half hours. This estimate was based upon the survey information indicating the distribution of families and our experience from the pilot programme. With an allowance for the travelling time between family homes, each Portage Visitor might therefore visit two families each day of the week, except for Fridays which we had reserved for supervision meetings and training. We reckoned that if this rough estimate proved broadly accurate, then the Engela Portage Programme with its staffing level at that time might support up to twenty-four families. This appeared to be a reasonable number and compared very favourably with the number of students previously in the department and the numbers within the Engela Training Centre as a whole.

### *Further Special Needs Surveys During 1993*

The number of referrals that we were receiving from clinics and parish offices by the end of March 1993 had dwindled to a trickle. Clearly we needed to rethink how we could more effectively survey the region. Our subsequent experiences at a small Lutheran mission to the West of Engela proved very enlightening.

The local Lutheran deacon at the mission had heard about the Engela Portage Programme and expressed great enthusiasm for us to survey her parish. She assured us that, as part of her duties as a deacon, she had met very many people with disabilities during home visits. She was also able to offer further helpful advice about how the survey should be conducted, which was to prove extremely valuable. For instance, rather than our returning to collect the completed questionnaires or waiting for her to forward them to the Engela Training Centre, she suggested that we visited two weeks later in April 1993, when she would call a meeting of all the local families who had children with disabilities. We agreed that we would speak to the families and complete the referral forms in situ.

This meeting proved to be quite a turning point to both the manner in which we conducted future surveys and also, perhaps more importantly, in my understanding of what working with families and communities in northern Namibia entailed. On the day of the survey several hundred people had congregated at the mission to take part in the survey. Although only a portion of the families present had children with learning difficulties, we were also able to offer general advice to the others. The experience



demonstrated the usefulness of holding these open referral meetings. Retrospectively, it now appears odd that I had imagined that families, who were not generally accustomed to written communications, would relay via a referral form information about their personal difficulties to the Engela Training Centre and to people they had never met.

So the survey at the mission also taught me, and perhaps also reminded my colleagues, about the importance and merits of personally meeting families locally. It was also very apparent from the opportunity to meet with families 'face-to-face' that we were able to gain a more detailed understanding of the special needs of their children, whom most had brought with them. This type of meeting also allowed us to explain the nature of the Programme we could provide, rather than this being delivered, possibly not as accurately, through an intermediary such as a nurse or pastor. Such meetings also provided further opportunities to make the community aware of who we were and what we were able to offer, particularly if they then discussed their meeting with other family members and neighbours.

Visiting the mission had also helped to remind me of the physical and practical difficulties that people had to face locally. Maintaining a traditional household in northern Namibia is daily very time consuming, and yet many of the families who came to the mission had walked long distances because of the hope of support for their children and other family members. As such, we were not only able to gain an insight into the breadth of need locally for a rehabilitation service but also to appreciate the tremendous amount of caring that must have been already taking place locally within families. It was also very apparent, given the large number of people with disabilities and the wide range of problems of those who travelled to the mission to the West of Engela, that we were able to question the myth that local people were secretive about disclosing the fact that their household included a disabled person.

Additionally, the experience at the mission provided a further reminder that we needed to be very cautious when preparing to conduct a survey, so that we did not over-reach ourselves in terms of the number of families we could support or that we did not raise too many high expectations of what we could offer, which might be subsequently dashed.



Reflecting upon our poor response with the clinic and parish office surveys, compared to that at the mission, revealed again how good relationships certainly help to smooth the way. It also demonstrated how important aspects of programme development can rest on fortuitous occurrences. If it had not been for the serendipitous encounter with the pastor at the mission to the West of Engela and her suggestions, we might have continued to struggle with an inappropriate impersonal survey methodology within a local culture which valued and privileged direct social contact.

The mission visit also helped to identify several further children aged between 5 years through to 15 years, who had a range of physical and learning difficulties, and whose families were keen to join the Engela Portage Programme.

### *The Engela Portage Programme During 1993*

By June 1993 the number of families supported by the Engela Portage Programme had risen to thirteen. Most of these additional families had been identified either through earlier referrals received from the clinics and parish offices, or stemmed from our visit to the mission to the West of Engela. Interestingly, once we had begun to work with some of the families at the mission, we found that other families who had not attended the survey visit also began to approach us and request assistance, although most of these families had children with visual and hearing difficulties, who could be catered for by Departments One and Two. It seemed that some of these later families had decided to delay coming forward, until they had witnessed how we operated and after they had discussed our programme with their neighbours.

We continued working with the families of these children throughout the remainder of 1993. During this period, the Portage Visitors became increasingly familiar with the processes of the Engela Portage Programme and working with families. As we developed a working routine and as the Portage Visitors gained in confidence, it became evident that we had further scope to increase the number of families with which they each worked, and this desire to expand the Programme became a key theme throughout the following year.

At that time, although we were identifying children with severe learning difficulties, I also remained concerned that we still did not seem to be identifying many very young



children. The ages of the children with whom we were working in December 1993 ranged from 4 years old through to 15 years. Although all of these children clearly had difficulties which made the use of the Portage developmental curriculum appropriate, I was conscious that we were not being referred many younger children, whose development might be greatly assisted by early intervention.

As I shall discuss in greater detail below, 1993 also saw some profound shifts in my understanding about how the purposes of Engela Portage Programme might be conceptualised and the type of support we should be offering to families. Likewise our expectations of how families might participate in the Programme were also to undergo some radical rethinking. Many of these changes followed from my gradual recognition of how the earlier character of the Programme had been heavily influenced by my Western ethnocentrism and limited reflexivity. Recognising that I needed to remain alert to my disproportionate influence upon the Programme compared to my colleagues, during 1993 I decided to take practical steps to redress the balance. Consequently during late 1993, with the agreement of my counterpart, I began to reduce my direct involvement in the daily management and supervision of the Engela Portage Programme. Although this shift in management control had always been anticipated, at that time I felt a more immediate urgency that we should begin this process, given my evolving understanding about the impact of my professional presence and the awareness of the limitations of my cultural knowledge locally. I also hoped that this shift in responsibility might help my colleagues in more fully recognising and appreciating their own expertise. This shift in responsibilities was also designed to ensure that the Programme should be 'sustainable' without my input.

#### *The Engela Portage Programme During 1994*

At the beginning of 1994, the three Portage Visitors had been delivering the Engela Portage Programme to families locally for some 10 months. We were conscious that there still remained scope to further increase the number of families that we worked with, possibly even beyond the anticipated maximum of twenty-four, provided that the families lived fairly close to each other. Also, although the Programme was still relatively new, we were aware that, at some stage, some of the families might wish to leave the Programme for various reasons.



We were also aware that we ourselves would need to begin to consider what criteria to use to help us decide when we should cease to provide support for particular families. Although the question of when we might cease supporting families had not been particularly addressed, we realised that at some stage we would need, in conjunction with a child's family, to agree that we had offered sufficient support and that the Programme would cease. However, I felt that this was a rather sensitive subject to discuss with my colleagues, as the previous practice at the Engela Training Centre regarding Department Three had been, as far as I was aware, that children stayed indefinitely. At this relatively early stage, this question was therefore not, nor was it required to be, fully addressed, although we arbitrarily had discussed supporting families for up to two years. We had also agreed with each of the families with whom we worked that one of the key criteria that we would include, in deciding whether to continue or to discontinue support, would be a requirement that families completed the weekly Activity Charts.

We also recognised that in order to further increase the number of families that we were working with in the immediate future, and to ensure that we could replace any families who left the Engela Portage Programme, we clearly needed to continue our surveys within the region for potential new families who might wish to join the Programme.

The population of northern Namibia does not, on the whole, live in villages or towns or indeed as any form of collective communities. Rather, most families live in separate homesteads, scattered with varying distribution patterns of density across the region. However, 'communities' are brought together at hospitals and clinics and as congregations attending local churches. As we had only had variable success with any of these sites for our surveys, we decided to focus on another 'community' resource, the primary school. Unlike secondary schools within our region, students attended the primary schools on a daily basis, mostly travelling to and from the school on foot. We realised, therefore, that primary schools potentially offered a further site for our special need surveys. However, unlike our previous method of surveying with the clinics and parish offices, we decided to follow the pattern we had successfully tried at the mission to the West of Engela and to organise meetings at which families who had children with special needs would be asked to attend with their children.



Our initial survey took place at one of the primary schools in the Omungwelumbe parish, some fifteen kilometres east of Engela. We choose the Omungwelumbe parish as we understood there to be a reasonable density of population in the vicinity, but, to that date, we had not received any previous referrals from there through either the local clinics or parish offices. The initial visit consisted of meeting with the Head Teacher and several teachers, to whom we described the Engela Portage Programme and answered any questions that they had. The Head Teacher proved to be very interested in the Programme and assured us of his co-operation, agreeing to mention the planned 'referral day', which we had set for two weeks later, to the assembled school and to ask the pupils to relay this information to their families and others locally. He also agreed to remind the pupils about our visit again, on the day before the visit was due. The subsequent Omungwelumbe visit proved successful in that, although the number of families who appeared were fewer than at the mission to the West of Engela, most brought their children with difficulties along with them, and fewer adults with difficulties appeared. However, while the day proved most useful for generating further students for Departments One and Two, there were none present who might have benefited from the Engela Portage Programme, with the exception of two children who lived some way to the north of Omungwelumbe which, if we had decided to include them in the Programme, would have entailed a considerable amount of travelling for the Portage Visitors.

During the course of 1994, we were able to conduct two more school based surveys, from which we were fortunately able to identify and include further families into the Engela Portage Programme, and these surveys, together with other referrals that we received, eventually brought the total number of families that we were able to support up to twenty-seven by September 1994.

Also during 1994, as we anticipated would occur, four of the families who had been receiving our support had left the Programme. These families left for a variety of reasons. In one family, the child who we had been supporting had moved away from the area into Angola. In another family, the 15 year old with Down's Syndrome whom we had been supporting became pregnant and, in the opinion of her family, was therefore now a 'woman' and too 'old' to receive any further education. Another family from the area near to the mission we had visited to the West of Engela, despite all of the encouragement we provided, consistently failed to complete the weekly Activity Charts.



The Portage Visitor reported that the family appeared to have some significant domestic problems and that the member of the child's family who had initially volunteered to teach the child had been forced to leave. A further family, whose child had been included in the pilot programme, had also left as her mother felt that she personally could not sustain the requirement for regular teaching, due to other demands upon her time. This child, who had Down's Syndrome, had in many ways already relatively well developed self-help skills and, at that stage of her family's involvement with the Programme, was able to help out with domestic chores fairly well.

### **3.6.2. Expansion Of The Engela Portage Programme - Phase Two**

Simultaneously with the planned gradual development and expansion of the Engela Portage Programme throughout 1994 as described above, we were also considering additional plans to extend the Programme beyond the present confines of the Engela Training Centre and the Engela region, so that it might operate within more distant communities. The origin of this idea sprung from the circumstances in which we found ourselves early in 1994. By March 1994, the Engela Portage Programme had been operating successfully for one year and we were fairly confident, from our review of the responses from families and from recognising our ability to sustain the Programme over that period, that we had demonstrated that the Programme was providing an effective and useful service for families locally.

Just as importantly, the Portage Visitors were very keen to continue with the Programme, claiming that they enjoyed their new pattern of employment including the greater responsibility and autonomy that it offered them. In short, we were able to conclude that we had gone some way to addressing many of the key concerns and questions that we had posed in March 1993 at the launch of the Programme, about the long-term suitability of home-based teaching in rural northern Namibia. However, despite the use of a variety of means of transport, we were also aware, from our special needs surveys and referral meetings in the region, that there remained a large number of children who had been appropriately referred to the Engela Portage Programme but whose families we could not support, because of the distance they lived from the Engela Training Centre.

At that time, we appeared to have reached a point where the scope of the Engela Portage Programme seemed to be effectively limited by our being based at and daily operating



out of the Engela Training Centre, although the three Portage Visitors all lived locally and were effectively operating within their own local communities. Consequently, the notion arose that if we could operate the Engela Portage Programme from within more distant communities away from the Engela Training Centre, we could in theory also provide a service to these areas.

Discussing the possible extension within the Department, we envisaged recruiting and training additional Portage Visitors to operate from their own homes in the more distant communities. We recognised that such an extension of the Programme would entail some major changes, as the additional Portage Visitors would by necessity have to travel to the Engela Training Centre each week for the weekly supervision meeting, and effectively they would have to work with greater autonomy for most of their working week, and with less immediate support than the present Portage Visitors had come to expect.

Pushing the boundaries of how we operated the Engela Portage Programme raised significant questions which at that time we could not readily answer. For example, while we were aware that the ELCIN Rehabilitation Centre staff most probably would or could not support the extension financially, we were unsure whether they would sanction the development of such a project in principle. I was certainly concerned that an extension of the Programme into further communities might be seen as rivalling the local World Health Organisation CBR Programme that the ELCIN Rehabilitation Centre staff were operating. There was also the question of how the extension would be funded, whether we would be able to recruit local people in the relevant communities and whether these people would act as volunteers or paid employees. Additionally, I was concerned about who we should aim to recruit and what additional training they might require. Perhaps most importantly, there was also the very significant concern about whether my counterpart would be able to manage the additional Portage Visitors or whether their relative isolation and distance from the Engela Training Centre or other factors would prove too difficult an obstacle.

Over the course of the previous year, 1993, we had been able to host several visits from expatriate special educational needs consultants attached to the ELCIN Rehabilitation Centre. Discussion included details about how the Engela Portage Programme operated



and the consultants customarily accompanied the Portage Visitors on visits to the homes of several families enrolled in the Programme. During these home visits, the consultants met with the children and discussed with their families their experiences of the Programme. In most cases, if not all, the consultants left the Engela Training Centre expressing support for the Programme. We had also received similar visits from other ELCIN Rehabilitation Centre senior staff and other local officials, including staff from the Ministry of Education and Culture. In addition, as I have mentioned above, we had been able to offer some in-service training, concerning working with children with severe learning difficulties, to the Rehabilitation Assistants trained by the Ministry of Health and Social Services. Consequently, we had achieved some notoriety within the country as a worthwhile project to visit for professionals with an interest in disability issues. As such, when I was able to raise the idea of a proposed extension with the senior ELCIN staff, they were already aware of the at least tacit approval which the Engela Portage Programme had received and so raised no objections to the proposed extension. However, it was made clear that ELCIN could not provide any funding.

#### *Funding For The Extension*

Over the course of many departmental meetings we eventually decided that, in terms of my counterpart's ability to cope with the management demands, it seemed reasonable that the extension should consist of no more than four additional Portage Visitors, working from two communities. We calculated that to fund an additional four Portage Visitors in terms of their salaries, training transport costs, etc. for a two year period would require N\$15,000 (approximately £3,000).

We were fortunate that news of our intended plans had reached the Director of the local Finnish International Development Assistance (FINNIDA) non-governmental organisation, a primary donor for the local Primary Health Care initiative and specifically the Engela Area Integrated Health Project (EAIHP). This Director had approached the Engela Portage Programme in August 1994 with an offer of funds. FINNIDA appeared to represent a very suitable donor, as it had extensive local experience and had taken sufficient interest in the Engela Portage Programme previously as to invite Department Three staff to contribute to in-service training workshops for clinic staff, community nurses and the local volunteer health visitors. FINNIDA therefore proved to be very willing to fund the extension of the Engela Portage Programme from September 1994 for a period of two years.



### Recruiting Additional Portage Visitors

Following the assurance from FINNIDA that we would receive the funding we required for the extension of the Engela Portage Programme, we began recruiting the extra Portage Visitors. Again, we found ourselves in 'unknown territory' as neither my counterpart, who had been promoted by her appointment to joint Head of Department Three in July 1994, or myself had any experience of the recruitment process. Initially, we were concerned with what the ideal 'profile' might be of the people we wished to recruit. Discussing this with other colleagues at the Engela Training Centre suggested a range of qualities, some of which were rather contradictory. For example, some of my Engela Training Centre colleagues felt that we should offer the posts to younger people, while others felt that more mature Portage Visitors would ensure they received greater respect from families. However, there was unanimous agreement that the Portage Visitors should be female, as it was felt that families might culturally be more resistant to male Portage Visitors. It proved difficult to ascertain from colleagues exactly why this might be so. Nevertheless, as we had little opportunity to determine 'experimentally' the validity of this opinion, such as through questioning families themselves, I felt that given the short remaining time available for preparing for the extension, we had to accept their judgement. In terms of the ages of the prospective Portage Visitors and their educational backgrounds, there was far less agreement to help us decide upon a profile.

The literature concerning community workers in regard to Community Based Rehabilitation programmes appears to be equally equivocal. The literature suggests that community workers may come from a professional background such as nurses or PHC workers (Trong Hai, 1993); teachers (O'Toole, 1988); school leavers (Arnold, 1988); or parents themselves (Thornburn, 1981). Community workers may be volunteers (Lysack and Krefting, 1993), or they may receive some form of remuneration, either from the community or pay via an agency (Mariga and McConkey, 1987). However, most studies, in line with the opinion of my Engela Training Centre colleagues, suggest that women make up the vast majority of CBR community workers (Lysack and Krefting, 1993; Kwok, 1995).



O'Toole (1987) also raised the question concerning what personal and professional qualities home visitors might need to be effective. Locally within northern Namibia what we had been aware of was that my three departmental colleagues were well accepted by families and that they were effectively able to implement the Engela Portage Programme. Deciding to use the present staff as our models for Portage Visitors, we then concluded that we would be seeking females aged between 30 to 50 years. They would need a basic primary level education, to have an interest in community work and to be able to work independently, often using their own initiative for extended periods. Additionally, on a more practical level, we recognised that the prospective Portage Visitors would need to be literate, and of good health due to the physical demands of the role.

At that time we were also aware, from the experience of the ELCIN Rehabilitation Centre staff who supported *volunteer* CBR workers, that this presented many pitfalls. Consequently I also felt strongly that the Portage Visitors should be paid at a similar level to the other Portage Visitors, rather than expecting them to work as volunteers. It would have been asking and expecting rather a lot from the additional Portage Visitors, both in terms of the responsibilities they had to fulfil and the conditions in which they worked, for them not to have received a salary. We needed to be assured that the new Portage Visitors would be consistent in the quality of service they provided to families and that, in such close knit communities as are found in northern Namibia, they were perceived to have integrity and credibility by the families they visited.

Furthermore, as we planned to train the additional Portage Visitors in a similar manner to that provided to my other colleagues within the Engela Portage Programme, i.e. two weeks intensive residential training, followed by two weeks supported and supervised visiting of families with my counterpart, together with ongoing weekly training as part of the supervision meetings, we needed to ensure that this considerable training investment was repaid and that we retained their services. Opportunities for paid employment are relatively few in rural northern Namibia and it would have been unreasonable to expect unpaid volunteers to not also be simultaneously seeking paid employment. Equally, as my colleagues were receiving a salary, we felt that it would have been unfair to expect the additional Portage Visitors to work alongside them as volunteers, completing similar tasks and with similar professional expectations. Serpell (1986) in Zambia also believed



that, while volunteers could provide some level of CBR service, providing financial incentives probably helped to improve the enthusiasm of community workers.

Geographically, we had targeted two distinct areas into which we hoped to extend the services of the Engela Portage Programme. The first areas contained the neighbouring Onamutayi and Omusheshe districts to the south of Engela and some 15 kilometres West of the main north-south road. The second area contained the neighbouring Ondobe and Etomba districts. Ondobe and Etomba lay some 20 kilometres east of Engela. We had received a few referrals already from these areas, but the difficulty in reaching them had prevented our providing these families with support. However, from July 1994, we began to survey these two areas more thoroughly. As with the other special needs surveys, we particularly targeted primary schools to both disseminate information about the Engela Portage Programme and also to act as venues to hold the later referral meetings. These surveys proved equally effective in identifying families and children with special needs, which could be potentially met by all three departments at the Engela Training Centre.

As it was also from these two areas that we intended to recruit our additional Portage Visitors we also posted leaflets at the local clinics and parish offices, which described the Engela Portage Programme and the role of the Portage Visitors. Prospective candidates were asked to submit a written application, containing details of their name, age, contact address, previous experience and reasons for wanting the post, to the Engela Training Centre.

The response from the Onamutayi and Omusheshe districts was excellent and we received some 20 applications from an apparently strong field of candidates. However, we received only one application from the Ondobe and Etomba districts. We found this disparity very puzzling. On returning to Ondobe and Etomba districts, to discuss the lack of applicants with local pastors and nurses, it was suggested that an influential individual with links to the Engela Training Centre had effectively provided further misinformation and quashed all further applications, except for the one we had received. Clearly this served to demonstrate how working in closely knit rural communities could provide significant drawbacks as well as advantages. In the face of such attempts at nepotism and the dearth of potential candidates, we had to defer any further attempts to



recruit from these areas. Effectively, this meant that we could only recruit two additional Portage Visitors during the remainder of my contract within Namibia, although plans were made for my counterpart to recruit a further two Portage Visitors herself later in 1995. Sadly, we were forced to re-visit the families who had asked to take part in the Engela Portage Programme in the Ondobe and Etomba districts, and inform them of our decision. In retrospect, this deferment in practice did allow us to learn from the experiences of recruiting and training the additional two Portage Visitors, which my counterpart was later able to draw upon.

In November 1994, we short-listed 6 candidates for selection and interview. The devised selection process consisted of a short presentation about the Engela Portage Programme, a question and answer session, a short written exercise for the candidates to test their literacy levels and later the candidates were all interviewed by my counterpart, the Engela Training Centre Project Co-ordinator, and the members of the community who sat on the management panel of the Engela Training Centre. This selection procedure ensured that the candidates were able to travel to and reach the Engela Training Centre by early morning, as they would be required to do for one day each week to attend the Supervision Meetings. It also ensured that they were confidently able to introduce themselves and generally had good communication skills, both verbal and written. As was judged by the selection panel, we also importantly ensured that local families, whose homes they were to visit, would perceive the prospective Portage Visitors as responsible individuals.

Overall, I believe that the selection process proved to be sufficiently effective, as demonstrated by the calibre of the two candidates who we subsequently selected, trained and worked alongside.

#### *Training The Newly Recruited Portage Visitors*

I have already described the training process that had been provided to my colleagues within Department Three in January 1993, to prepare them for the subsequent pilot programme. This had proven to be satisfactory. However, I was also aware that my Department Three colleagues had some significant advantages over the newly recruited Portage Visitors. They had all gained experience from participating in the early development of the Engela Portage Programme and had received a substantial amount of



ongoing formal and incidental training in behavioural teaching techniques and other educational skills. Additionally, as the original Portage Visitors were based at the Engela Training Centre, to which they generally returned each day, they could readily raise any concerns or questions they might have with my counterpart or myself.

In contrast, the new recruits, although experienced mothers, had no or very little experience of working with children with special educational needs and had not been part of the evolution of the Engela Portage Programme. Furthermore, once they began to work within their communities, I realised that they would not have such ready access to support from myself or my counterpart, apart from the weekly supervision meetings. Consequently, I was also aware at that time that we would probably need to improve and strengthen the original training programme, if we were to ensure that the additional Portage Visitors, the Portage trainees, received adequate training and support.

Therefore, my counterpart and myself subsequently planned their training programme so that it operated on two levels. Firstly, we provided a two week residential training programme at the Engela Training Centre, in which we offered workshop sessions on a range of topics related to Portage and children with learning difficulties. Throughout the residential two-week course, the Portage trainees took part in a range of exercises including role-play, question and answer sessions, and practical and written exercises. The Portage trainees also accompanied the other Portage Visitors on visits to the homes of local families, who were then already enrolled with the Engela Portage Programme, so that they could apply some of their newly learned skills e.g., completion of an Engela Portage Checklist, filling out an Activity Chart and discussing the family's view of Portage, and so forth.

Secondly, following the residential training, we provided the trainees with supported visits to a few of the families, who had asked to take part in the Engela Portage Programme, in the trainees' own communities. After the residential course, my counterpart and myself met the two Portage trainees in their own communities each day over a further two week period, except for supervision days when they travelled to the Engela Training Centre. This provided us with the opportunity to introduce each of the Portage trainees to four families with whom they would be working and to, again during the first of these two weeks, support them during their visits, while they set about



beginning to introduce the Engela Portage Programme to the families. During these early visits, we were able to observe the Portage Visitors complete their first Engela Portage Checklists and engage in the process of agreeing on a teaching target with the children's families. Later, in the second week, we made follow-up visits to each of these families, in order again to support the Portage Visitors as they assessed their four families' ability to implement the teaching programmes agreed upon during the previous visit. In so doing, we were again able to monitor their ability to offer further advice and support, as well as plan for the following week's teaching. As we all travelled to each of the individual families as one group, this provided the two new Portage Visitors with the opportunity to both play a central part in working with their own group of families and also to observe their other colleague work with families. Therefore, we were also again able to ensure that a considerable degree of over-learning was available to each of the Portage Visitors, as well as introducing them in the most practical sense to a wider range of children with special needs and family circumstances.

Within the following Week Five and Week Six of the training programme, the Portage Visitors returned to visit the families on their own, although we accompanied them to the vicinity of each of the families' homes but had no direct contact with the families. While we were not immediately present during these visits, we were readily at hand should the Portage Visitors need support. We were able to implement the above training programme from the beginning of December 1994 through to the end of January 1995, following which the newly recruited Portage Visitors began to increase the number of families with whom they worked, as they gained greater experience and understanding about the Engela Portage Programme.

#### *Managing The Additional Portage Visitors*

During January and early in February 1995, the newly recruited Portage Visitors began to work independently, albeit with limited experience, within their own communities. The training structure and Programme framework allowed close monitoring of them as they went about their duties and the early feedback that we received, from the families they visited, appeared to suggest that they too seemed to be responding positively to the introduction of the Programme.



Consequently by the close of February 1995, when my employment contract came to an end and I prepared to leave the Engela Training Centre, the Engela Portage Programme was supporting some 48 families in northern Namibia with their children with severe special educational needs. In addition to my counterpart continuing to manage the operation of the Engela Portage Programme, as she had done since early 1994, following my departure she also undertook the task of recruiting and training an additional two Portage Visitors, which she did in July 1995. At that time, the Engela Portage Programme was reported to support 50 families with a further 14 who were waiting to join, upon the final training of the two new Portage Visitors (Ministry of Health and Social Services and Engela Area Integrated Health Project (MHSS and EAIHP), 1995).

### **3.7. POST-MORTEM: Reflections And Evaluation**

#### **3.7.1. Major Shifts In My Understanding Concerning The Portage Programme And My Expert Role**

From the formal launch of the Engela Portage Programme in March 1993, I had been particularly concerned to ensure that the Programme developed so that it adhered as closely as appropriate, taking into consideration local circumstances, to the model of Portage that I understood and as it was usually conceived within the United Kingdom. At that time, I believed that the Programme should aspire to develop into an effective, efficient and systematic method of supporting local families to teach their children new and useful skills. As such, my understanding of Portage and how to implement a programme locally was very similar to the technical concerns found within the bulk of the Portage practice and research literature.

Although I was increasingly becoming aware of some of the challenges that the differences within the local context and culture seemed to pose for my preconceived ideas of how Portage should be conducted, at that time I did not fully anticipate the enormity of the shifts that I would have to accommodate. These shifts were both in terms of my understanding about the practicalities regarding Portage and, more significantly, my own conceptual understanding about the nature of working with colleagues and local families. I think that, despite my best intentions, I was in effect perpetuating a view of special education that remained profoundly European in its origin, practice and prejudice, with fairly limited concessions, certainly conceptually if not



practically, towards beginning to ensure that the Programme reflected the local cultural context. In many respects, the adaptations that we had made to the original Portage materials up until that time, both in terms of translating the materials and sifting through the Checklist adding and removing items, were essentially largely cosmetic. Fundamentally, the underlying philosophy and values of the Engela Portage Programme remained thoroughly Western.

However, through the experience gradually gained by working with local families and as my relationship with my departmental colleagues improved so that I started to learn from them about the local context and about their different cultural beliefs and worldviews, so I began to question some of these earlier foundational beliefs. Increasingly I found that the differences and challenges of working in a very different culture provided both opportunities and pressures to learn and to re-conceptualise my notions about some of the central tenets of Portage, as I had earlier understood them. As I began to recognise the limitations and relevance of the original Portage model to aspects of the local context, so too I started to question the Engela Portage Programme's prime responsibilities and future direction. Below, I have identified and discuss some of the most significant changes to my understanding. I also present these as some examples of the important reciprocal processes of learning and exchange that I believe cross-cultural encounters can offer to experts.

### *A Shift In Emphasis From Educational To Social*

Portage is in essence an educational programme. The teaching process and children's learning are significantly foregrounded as essential and fundamental to the whole Portage process, above other subsidiary benefits that the programme might offer. Portage materials, such the curriculum-checklist, activity cards and charts, are designed with the explicit purpose of enhancing the efficiency of the teaching that takes place between the parent and child, and between the Portage Visitor and parent so as to ensure that children's learning is maximised.

However, following the launch of the Engela Portage Programme, with increased opportunity to visit local homesteads, I began to learn more about the living conditions of many local children with special educational needs, and to build upon the understanding I had formed as a result of the pilot programme described above. I was



able to discuss with families how the children were usually cared for within their families, and they described how the children spent their days and the activities the children were typically involved in and what was expected of them. Afterwards, these visits also proved to be important topics of discussions with my colleagues at the Engela Training Centre, when we were able to reflect upon what we had seen and share our understanding about the emerging picture of life in local homes for children with special needs. The image was that the lives of some children with significant special needs were characterised by many appearing to spend long hours each day either lying on their own in the shade of a homestead hut or, if they were more mobile, engaged in solitary play. While many families said that they had tried to involve their children in helping with domestic tasks, most only played a minimal role, due to problems caused by their various disabilities. Overall, it seemed that compared to the more active lives of their brothers and sisters, children with severe special educational needs enjoyed far less social contact with others within their family. Consequently, these children seemed to have had little time to be with others, let alone the "time to learn" that Mittler (1981, p. 109) recognised as an important ingredient in helping such children.

While it did not seem that these children appeared to be any less loved or valued by their families than other children, perhaps due to the difficulties in communicating that these children often had, together with the adults and older children being too busy around the home, many were effectively ignored and left to themselves, beyond being fed and cleaned. It also appeared that this was not simply a cultural characteristic of local child rearing practices generally, but that there was a qualitative and quantitative difference between the type and amount of social interaction that children without severe learning difficulties enjoyed with their families, compared to that of the children who had significant learning difficulties. Children without difficulties, even very young children, would often take an active part in family life, such as being sent on small errands or to accompany older members of the household as they went about their work. Indeed, children locally within their families generally seemed to have plenty of social opportunities and were often expected to actively participate in family life.

The view that I formed, about the nature of the relationship of children with severe learning difficulties and their families, also seemed to concur with the opinion of O'Toole (1991, p. 24), who commented upon what he described as the "tedium of the



day for many of the children with special needs”, as noted in his survey of CBR programmes globally. Bean and Thorburn (1995) also suggested that children with disabilities in Jamaica risked being left alone at home, without the benefits of social contact enjoyed by children without disabilities. Indeed, my image of how children with special needs lived in rural northern Namibia also seemed to match that later recorded by the committee which visited and spoke to local Namibian families, as part of the independent evaluation of the Engela Portage Programme in 1995 (MHSS and EAIHP, 1995). The evaluation noted, following their interviews with the families of the children who took part in the Programme, that the families claimed, “The only activities done with the child before the EPP [Engela Portage Programme] were passively cleaning or feeding the child” (p. 13, insertion added).

This realisation about the relative social isolation of children with more severe special needs led me to reconsider my earlier concerns with devising the Programme so that it principally ensured the efficient teaching of children, as might be judged by Western standards. Through working with families we came to understand that it was the actual nature and quality of the relationship between the child and their family, and the fact that the family themselves judged the Programme to be supportive, that was of prime importance, rather than striving towards a specific teaching objective. As such, the actual teaching target chosen by the child’s family became of *secondary* significance to the Programme’s ability to encourage and support an improvement in the pattern of social interactions for the child within their family.

This reconstruction regarding the importance of learning outcomes per se as the prime objective for the Programme was also an acknowledgement that, prior to any effective teaching taking place, the Programme also had to be able to ensure that the children participating in it received regular, positive social contact with other members of their family and that the Programme was also seen as supportive by the children’s families. I began to view the Programme not as a means to ensure the systematic teaching of children and leading to concrete measurable ‘outcomes’, but rather as a vehicle for promoting and improving the quality and quantity of family interactions. I also became concerned with changing and broadening the type and purpose of the interactions that the children experienced within their homes. In this way the Engela Portage Programme remained educational, but in a very much broader sense. The Programme’s emphasis



had shifted from a concern with training family members to be effective teachers and a pre-occupation with developmental gains by the children, to enhancing the qualitative pattern of relationships between the family and the child with the disability.

### *Retaining The Teaching Narrative*

Despite recognising the fundamental changes that were necessary in how I conceptualised the Engela Portage Programme, I remained very aware that the perception of the Programme for families as an educational programme was important. By continuing to employ the educational narratives central to Portage, this allowed the Programme to be readily recognisable as helpful to families, while also serving as a practical means by which we could legitimately work with and encourage local families to consider changing their usual patterns of interaction with their children. As I believed that the language of education legitimised our work with local families, ('to teach families to teach their children new skills'), so too did the narrative of education ("to teach their children") seem to legitimise and indeed also to structure, the improved interactions between the children with special needs and their families. As I will later refer to in Chapter VI, I had to ensure that the narratives we used with families to explain the Programme were not 'too unusual' as they might not 'fit' with their understanding. Moreover, given that we had not abandoned the intention of the children actually learning new skills but that it was simply no longer the prime aim, it would have been difficult to imagine how else we could have encouraged families to interact with their children if not ostensibly for educational purposes. In this way I believe that the Engela Portage Programme, in effect, came to represent a unique, culturally relevant meld between the robust and pragmatic behavioural model of learning associated with Portage and the interaction-based and social-cognitive learning approaches in which children's and their families learning is associated with meaningful shared social experiences taking place within a supportive, appreciative context.

As the Programme continued to remain concerned with ensuring that the families felt confident about their own teaching abilities, so the educational narratives were not incompatible with our reconstructed purpose of the Programme. We recognised that continuing to highlight the teaching aspects of the Programme remained important, as we also began to understand how ostensibly a focus upon teaching provided a credible explanation locally for families to receive a visit from the Portage Visitor, a stranger.



From my understanding of the local culture, such regular weekly visits might have otherwise proven to be culturally unusual and therefore difficult to sustain. Moreover, the visits themselves also proved to be of significance to families who described how the visit by a concerned 'expert' was an important aspect of the Programme, which they found generally very supportive.

In acknowledging that the teaching target chosen by the child's family to teach was not of prime importance, I also recognised that this view ran contrary to some accepted special educational needs philosophy. For example, from a narrower utilitarian perspective, helping some families to teach their children how to count and write their name might be judged as of questionable value to the practical realities of the children's lives. However, aside from the advantage that the children's enrolment in the Programme encouraged more regular daily social contact between them and their family, the utilitarian perspective also neglects the wider empowering gains to families and indeed to the Portage Visitors, that stemmed from children achieving skills that the families themselves had judged to be important and had selected for their children.

### *Recognising The Diversity In The Needs Of Families*

Through working closely with families in their own homes, I also began to learn and appreciate that we had to ensure that the Programme maintained a greater tolerance and acceptance of a much wider degree of participation by individual families. We learned that we needed to acknowledge that there was a much wider diversity in family life styles, and in the ability of different families to understand the operation of the Programme. As our experience with families increased, we recognised that there would be families who would be well able to use all of the materials that we had adapted and devised, such as the Portage Activity Chart, and who would also very diligently offer teaching sessions to their children several times daily. But we also had to accept that, for a host of reasons, there were inevitably other families who while wishing to remain part of the Programme, may not be able to reach any preconceived ideal of how the Programme should operate.

We also came to understand that there would occasionally and inevitably be disruptions to the pattern of home visits and teaching opportunities that families could offer their children such as through illness and other reasons. Yet the families enrolled in the



Programme, despite such disruptions, appeared to remain enthusiastic and the Portage Visitors enthused. Indeed, I think that I may probably have been alone amongst my colleagues in finding these deviations from the idealised Portage model worrying. Such circumstances lead me to reflect and to examine that which had I previously accepted as self-evident. Therefore, initially simply through necessity, I came to accept that the apparent degree of interruptions to the Programme were inevitable, but were not necessarily disastrous. It became a matter of accepting the fact that occasionally some of the families would have difficulty in finding opportunities to teach their children and that the pattern of our support to them might temporarily also prove to be rather patchy. This was simply a reflection of the realities of working within the local context. Clearly, it was not our aim to add to the burden that families experienced but to positively support them to make the best use of the time they did have available to interact with their children. Later I saw this not as an enforced necessity, but as a measure of the Programme's capability, in that it both demonstrated the robustness of Portage to cope with disruptions and served as an indication of the ability of the Programme to adapt to meet the needs of local families, rather than families having to subscribe to the parameters dictated by our, and particularly my, vision of the Programme.

Nevertheless, even in the case of families who experienced difficulties, if we could affect some positive changes in the relationship between themselves and their children, that they considered to be worthwhile and helpful to themselves, then we realised we had achieved some measure of success. In appreciating that families would have greatly varying needs, I think that McConachie (1994, p. 400) put this well when she claimed that:

"Families differ greatly not only in how they organise themselves and in the resources they have but in how they perceive the challenges they face. The same event will have different meanings and effects for different individuals. Ultimately, the implication is that families differ in the types of services which they find most helpful in supporting their own coping strategies".

In terms of my own understanding of my role and the Programme, I came to acknowledge what McConkey (1994a, p. 11 insertion added) aptly suggested, that:

"It is farewell to authoritarian experts [and to authoritarian teaching programmes] prescribing similar treatments to "patients", and a welcome to professionals who



meet people as people, striving to share their community and valuing the worth and dignity of each as they seek to overcome the adversities of life”.

### *The Engela Portage Programme Materials*

Our fundamental shift in terms of how we conceived the role of Portage, and our understanding of what the Engela Portage Programme might offer to local families, was clearly to also have consequences for how we considered the Programme as a whole. Given the wide diversity in the abilities and circumstances of the families locally, we acknowledged that there were and would be families where teaching opportunities would be fewer, or whose literacy levels and conceptual understanding would undermine their ability to use some of the materials, such as the Activity Charts as we noted during the pilot programme.

We found in some families that the Activity Charts completed by the family did not always reliably record when teaching had taken place or how it had progressed. Initially, I, and I also think my colleagues, had been seriously concerned with this and the threat to the supposed validity of our records and the monitoring of children's rates of learning. This was not how I had planned and anticipated the Programme to operate and it appeared to undermine our efforts at ensure continuous evaluations of the teaching. However, as we gradually found that many, but not all, families did not share our concerns with accurate recording, we became resigned to accepting that the records we collected would inevitably be less precise. It became evident that, while many families appreciated and valued the support and teaching directions they received, they perceived the recording as possibly either superfluous, too onerous or both. Yet, as these families continued to both teach their children and relish the support they received from the Programme, I began to see these concerns too as probably a reflection of my own anxiety over control and to understand that such a tightly scripted monitoring system was probably not suitable locally.

Unexpectedly, once I accepted the inevitable need to be tolerant of the variation between families in their record keeping abilities, this issue quickly far less troubled me. In fact, I think that this perhaps also made me more aware of the importance of matching the Programme to the realities of local family life, rather than, albeit unconsciously, imposing my own Western influenced standards and trying to match the families to the



Programme. The dissonance I experienced during this learning process proved highly reflexive and represented a further significant turning point in my understanding. The eventual acknowledgement of the futility of my preoccupation to maintain an unnecessarily prescriptive record system upon the teaching process used by families, was also part of the wider dawning of a new professional understanding regarding the importance of the interpersonal or relational aspects of the Programme, which I had previously neglected. As a team, I think that this also helped us to begin to appreciate and shift our concerns to the quality of relationships, both those that we built between ourselves and the children's families, and those that we were able to encourage between the children and their families, as described above.

At one stage we even considered abandoning the use of the Activity Charts or simplifying them even further. However, my colleagues were keen to preserve the Engela Portage Programme Activity Charts as we had reformulated them after the pilot. I think that this was not simply because they were conscious of the time that we had all invested into the development of the revised Charts, but also because the Charts continued to represent for them a reassuring framework which structured and guided their visits. In a fashion, the Charts served to support the management of home visits, at their simplest acting as an aide-memoire and, at their most helpful, as a step-by-step problem-solving procedure to assist towards tackling some of the very complex and profound difficulties of some of the children. Also, for my colleagues I believe the Activity Chart represented an emblem of their professional status and perhaps this also helped the families to be reassured that the Portage Visitors had some specialised well-planned technology from which they too might benefit.

I also recognised that the Activity Chart provided a convenient and tangible contract between the families and ourselves. Families were made aware that one of the expectations we had of them was that they completed the Activity Charts. Therefore, the completion of the Charts by the families also provided some indication that they were motivated and keen to remain within the Programme. What became of importance was our ensuring that the children's families felt comfortable with and not threatened by the Programme, and that they continued to want to take part.



I also began to understand the wider uses of the Engela Portage Checklist. As I have already described, from the experience of the pilot programme, we also noted that it proved helpful in sensitising families to the sorts of specific activities that they could teach their children. However, I was very concerned that the Checklist was not used too prescriptively. To this end, we were able to ensure that, if a family chose to teach the child a skill which was outside of what we might initially believe to be their 'developmental level', we could usually accommodate this by breaking the skill down, through task analysis, to some much simpler prerequisite skill. Nor did we try to impose our views of what we ourselves believed might be the most appropriate group of skills to teach the children. So, for example, when we worked with families whose children could not stand or take a few steps, or manage some other fundamental skill, but who chose to teach their child to rote count or hold a pencil, we were careful to accept their target even if by our judgement there seemed to be a more pressing learning priority. In this way I believe that we ensured that the chosen teaching targets were meaningful for the children's families. Although, from a Western understanding the advice given by Baine, (1988) arguing for more 'ecologically valid' special needs curriculum seems rational, this may not always concur with the cultural meaning attributed by families from different cultures. In such circumstances the 'expert-knows-best' position may not be appropriate. Again, the less directive approach to working with families was in line with our prime concern of ensuring that the child's family were sufficiently motivated so as to ensure that they interacted more frequently with the child, and that this should prove rewarding for the child and the family.

This was not to say that the Activity Charts and the use of the Checklist did not also have some genuine value for the children's education. All of the children who took part within the Programme learned new skills, as I will discuss below. To this extent, I believe the fact that the children learned new skills demonstrates the effectiveness of the Programme in ensuring that families did, indeed, interact socially and positively with their children as we hoped, although of course not all children acquired as many new skills as others. Differences in the accomplishments of the children were to be expected, as the children had a wide range of individual needs and difficulties, and as their families and circumstances also varied widely.



### *A Shift In Management Style*

The opportunity to work more extensively with families in their own homes not only provided valuable further learning, which led to a re-conceptualisation of the Engela Portage Programme, but also encouraged me to re-examine my involvement in the management of Department Three. Reflecting upon the earlier choices that we, as a Department, had made and on the previous development decisions made regarding the Engela Portage Programme, revealed how, despite my best intentions, my ideas had been clearly overshadowed by Western presuppositions. There had been a thorough lack of self-reflexivity, despite what I felt at the time was my genuine desire towards collaborative working with my colleagues and my sensitivities towards the local culture. To a large extent, much that had taken place up until then had been both commensurate with my personal conviction that a home-based teaching programme was ideally required locally and to my 'vision' that the Programme should closely adhere to the original United Kingdom Portage model.

By the launch of the Engela Portage Programme, I had begun to reconsider other aspects of my involvement within the Department. I had to acknowledge that perhaps the problems that I had first perceived, such as the lack of management and the disorganisation within the Department, was also a convenient portrayal which justified the need for 'development' and the beneficial application of my professional skills. It had certainly been the case that, at times during the first 12 months or so of my stay at the Engela Training Centre, my views about my management role had not only been characterised by enthusiasm to promote change, but also by a profound sense of frustration at the slow pace at which change often seemed to take place. When I first joined the Centre, I frequently lamented how it seemed that even such straightforward tasks as organising visits to conduct the special needs surveys or to meet families, would often be stalled by a catalogue of delaying and seemingly unnecessary and complicating reasons. Aside from the delay in the appearance of those who had been 'promised' lifts, or the poor punctuality of some of the Department's own staff, delays often related to the inevitable mislaying of equipment. Once our journeys commenced, we were frequently asked by other colleagues to detour from the route, for personal as well as professional reasons. What, from a Western perspective would probably have been expected to represent a straightforward task, which might have been completed within a few hours at most, in the context of the Engela Training Centre typically could occupy the whole or



most of the working day. Yet these rather negative interpretations of how things were done locally also came in for re-scrutiny, as I realised that it was I who was actually out of step with local priorities.

I came to understand that much of what I took to be frustrating and inefficient, in terms of local work practices, did not disturb my colleagues within the Engela Training Centre, nor had it troubled the students with which we and the other two departments worked. In effect, the only person who had felt frustrated by the apparent slowness had been myself and it had been unfortunate that it had taken me several months to eventually come to this conclusion. I came to understand how I embodied a Western version of time that was inappropriate and out of synch locally. From that point, I think that I attempted to become increasingly vigilant to how I managed the Department and the operation of the Programme, and to how I was or was not attuned to local circumstances. Again, such experiences led me to reflect how “people within different socio-historical groups seem to account for themselves, and their world, in very different ways” (Shotter, 1993a, p. 37). This is not to say that I came to believe that my Western ideas were inherently wrong, rather that I endeavoured to check my initial tendency to too hastily form an opinion, and to try to consult widely among my colleagues as to their understanding, rather than try to impose upon them my own intelligible order. I began to respect that local ways of doing things had their own validity. These and other experiences also served to underline the potential danger of Western experts working in similar contexts for short placements, which deny Westerners the benefit of time, not only for developing sensibilities to the local culture but, most importantly, acknowledging the need for such sensibilities in the first place.

Central to my awakening to the local social cadence was understanding how the lives of my colleagues within the Engela Training Centre seemed to be less slavishly ruled by ‘clock-time’. Rather, I noted that colleagues seemed to give precedence to the natural pace of human relationships and their social obligations and responsibilities. The daily greeting ritual, involving handshakes and a formal series of personal questions and responses, that one was expected to undertake when meeting individual colleagues for the first time each day, demonstrated a tolerance and respect for this patient courtesy. I began to perceive how locally, at least within rural northern Namibia, there existed a warm civility in personal interactions, which appeared to value how the more immediate



obligations that one had at the instance of meeting another person took precedence over any future appointment. Indeed, given how such practices seemed customary and expected, it was likely anyway that the participants of any future appointment would themselves either be delayed or that they would not take offence at any delay. In such a social culture, my behaviour may have initially seemed to my colleagues as rather arrogant and impatient, but, as I was later to hear from my local friends and colleagues, this was no more than they had come to expect from the 'Western way of doing things'.

Such uncomfortable realisation represented further grounds for reflexivity regarding my practice, and helped to continue to further unravel an understanding of my professional self and 'development' role within Namibia. Additionally, it most importantly demonstrated how I had been and could, if not alert, again quickly fall very much out of step with local cultural priorities.

I was also cautious of unduly romanticising local practice and custom and over criticising Western ideals. I recognised that, as the Head of Department Three, I had to take responsibility for the management of the Department, but it was also clear that given my cultural naïvety it should not be my responsibility solely. Rather, I began to understand more how ideas of development and expert practice needed to be more fully collaborative, contingent and sensitive to the style and pace of change that was in accord with local circumstances. And yet I was also present within Namibia with the explicit purpose of sharing my understandings and knowledge with my colleagues. This seemed to call for a complicated dual positioning in the synthesis of my Western worldviews with those which were held locally. Neither alone would suffice, both had to be challenged, considered and merged. Both my own and my colleagues' knowledge and understandings had to be particularised to the prevailing context.

### **3.7.2. Evaluation Of The Engela Portage Programme**

Concerning professional endeavour, Faupel (1986, p. 7) suggested that:

"There are various ways in which problems can be solved and some can be fortuitously successful (hunches and inspirations, etc.) but the most reliably effective way of finding a solution reducing the discrepancy between 'what is' and 'what should be' is the use of the rational or scientific method".



Consequently, as with the previous stages of the Four P's' professional problem-solving framework, Faupel recognised the 'post-mortem' phase as being no less important empirically and one which essentially entailed *evaluation* through reflection and feedback of the effectiveness of the three previous stages.

As the reader will probably appreciate, attempting to evaluate a programme such as the Engela Portage Programme, which developed through a process akin to practitioner action research over a number of years, and which undertook to remain responsive to the shifting needs of all those involved, is far from straightforward.

Similarly, Stuart (1991, p. 142 ) claimed regarding evaluation of professional research in Lesotho schools, that:

“The results of action research, because of its flexible and process-orientated approach, are not amenable to formal evaluation. We can not measure the effects the project had on student outcomes; all we can say is that it did not detract from student learning, and probably enhanced it”.

Stuart recognised that evaluation of social programmes should be more than mere number crunching and scrutinising performance indicators, but rather it is a multidimensional complex process, which is always likely to be open to the widest interpretations given the potentially differing perspectives of all involved.

The complications of evaluation, especially of community based programmes in developing countries, were also highlighted by O'Toole. O'Toole (1991, p. 41, insertion added) claimed that evaluation of such programmes was rather problematic because of a “lack of suitable methods of evaluating ‘successful’ outcomes”, adding that “there is a need for developing an appropriate methodology [for evaluation]”. O'Toole defined evaluation as “the process which attempts to determine, as systematically as possible, the relevance, effectiveness and impact of activities in the light of their objectives” (p. 41). However, as with Stuart (1991), O'Toole recognised that while “The definition for evaluation can be easily stated; reliable answers are considerably more elusive” (pp. 41-42).

O'Toole also complained that internationally some parental involvement programmes had made no attempt at evaluation, suggesting that this may have reflected shortcomings



in their initial design. Such a complaint is unlikely to be one which can be levelled at Portage programmes generally, which as I have noted in the review of the Portage literature, with their behavioural heritage, have traditionally been firmly married to the notion of measuring and reporting programme outcomes. Yet this type of evaluative data alone is unlikely to be satisfactory. As Stuart (1991) seemed to have argued, useful evaluation must move beyond that which is readily quantifiable and include the qualitative and, perhaps, less tangible aspects of a programme's effects.

The difficulties associated with the practicalities of programme evaluation, mentioned by O'Toole (1991) and Stuart (1991) and later by Martlew and Connolly (1995), were also pertinent to the Engela Portage Programme. The very nature of expert practice and research in social contexts is that frequently programme implementers are forced to reassess their early practice and research aims and to dynamically alter or reinvent new objectives and work practices, as the needs of those both implementing and receiving the programme unfold. Inevitably this is likely to create tensions for practitioners, who may be faced with the dilemma of whether to privilege the pragmatic practice needs of the programme by shifting objectives and altering course, or adhere to earlier plans in the interest of clearer empiricist evaluation. These concerns, while not necessarily being mutually exclusive, may not be wholly compatible, particularly when practitioners find themselves in unfamiliar cultures where earlier presumptions are overtaken by unexpected problems or a shift in priorities, as a consequence of fresh understanding. For example, our shift in understanding about the Engela Portage Programme, when social interactional concerns took precedence over the previous narrower educational focus, caused complications for how we evaluated both of these facets of the Programme.

As I have suggested above, a quantitative evaluation narrative is fairly easy to conjure up in the case of Portage programmes generally. Supporters of Portage frequently boast that it is a "service delivery system...supported by a built-in evaluation component which enables service delivery to be maintained and continually improved" (Cameron, 1997, p. 15). Cameron was essentially referring to the fact that Portage, in its use of a number of recording systems, potentially provides a range of readily accessible data by which the activities of the Portage Visitors, family members and the children themselves can be measured, recorded and analysed. As I have described within the review of the Portage



literature, a preoccupation with performance indicators appears in many descriptions of Portage programmes, which, to my understanding, frequently renders the research reports as rather anodyne tales of apparent technical procedures (e.g. van der Meulen and Sipma, 1990; Yamaguchi, 1996; Oakland, 1997).

While quantitative evaluation clearly has its place in establishing a fuller picture of a programme, it also represents a powerful rhetorical device to convey to the reader a reassuring sense of the research's precision. Figures and graphical representations further enhance the illusion that the reader is 'really seeing' the information first-hand, unsullied by the researcher's biases. What is absent from a largely quantitative evaluation are the important questions of how those who both provided and received the Programme perceived, valued and generally understood it and how the Programme affected family relationships. Indeed these questions also go beyond the 'measurable scales' of "parental competence, locus of control and marital stability" which have been advocated as additional Portage evaluation criteria by Rennie (1987, p. 69), or even the measurements of family stress levels and family self-esteem levels (Cameron, 1997).

Unfortunately, these emotional and social aspects of the Programme are largely beyond direct measurement in the positivistic sense. They can at best only be inferred through conversations with families, our own observations and interpretations of change and, perhaps most importantly, from the agreement of families to continue, or not, with the Programme, despite the additional daily demands that it may have placed upon them. These aspects of evaluation depend upon the subjective processes of inference, conjecture and assumptions. As I have already described, it was indeed these very elusive aspects concerning the *processes* of the Programme, rather than the programme's measurable *products*, which I came to understand as of prime importance, certainly beyond a simplistic concern with the actual gains that children might have made in the acquisition of new skills.

Consequently, in this section, after a brief summary of the practical achievements and scope of the Engela Portage Programme, I will depart from the more conventional Portage view of evaluation and attempt to describe these relational and wider evaluative aspects. In so doing, I have tried to privilege both the views of the families who were enrolled in the Programme and that of my colleagues, the Portage Visitors.



### *The Scope Of The Engela Portage Programme*

Below I have provided a descriptive overview of the operational details of the Engela Portage Programme, as part of the evaluation process. In so doing, I have summarised some of the information which we collected during the first two years of the Engela Portage Programme's operation. This information is drawn from the records of the families whose children had been involved with the Engela Portage Programme during the 22 month period, stemming from March 1993 through to December 1994. I have not included information from those children and families who later joined the Programme, following its extension in 1995, and who were supported by the recruitment of additional Portage Visitors, as I had less contact with these families.

### *The Families Supported*

The Engela Portage Programme, between March 1993 and December 1994, supported twenty-eight families who had children with severe learning difficulties. The children's ages ranged from 2 years old through to 15 years, with a mean age of approximately 8 years and 6 months. Seven children were aged 5 years or younger and eleven were aged 10 years or older. Thirteen families joined the Programme during 1993 and the remainder throughout 1994. In addition to these twenty-eight families, six other families were also visited at some stage during this period but left for a variety of reasons as I have already described above.

All of the twenty-eight children, thirteen boys and fifteen girls, who were involved with the Programme during this initial two year period, appeared to have a wide range of special educational needs and which, in my experience, as an educational psychologist would have been described as severe. Eleven of the children enrolled in the Programme had Down's Syndrome, which led to them experiencing various levels of learning difficulties concerning their social, self-help, speech and language, and general cognitive skills, some of which were very severe, others more moderate. However, for a few of these children, as they were relatively fairly well co-ordinated physically, they were often able to help their families complete a limited range of domestic tasks, such as fetching firewood, tending animals, and so forth. We believed that several of the children with Down's Syndrome also appeared to be experiencing various degrees of hearing impairment and one had also lost his vision, being effectively blind.



Three of the children appeared to have very severe quadriplegic cerebral palsy, which restricted their speech and language skills, as well as their physical ability. All three children displayed very acute spasticity, which had led to severe contractures of their limbs, fingers and feet, and so further restricting their range of motion, including their ability to articulate clearly. As a consequence, these children relied heavily on their families to cater for most, if not all, of their daily needs and they appeared to be unable to practically contribute to the general life of the family home.

The remainder of the children experienced severe and profound learning difficulties and an assortment of sensory problems. Most of these children also had significant problems with their speech and language and physical skills and could only contribute minimally to helping with family and domestic duties. Consequently, these children depended almost wholly on the support of their families to help them with most of their self-help skills.

None of the children within the programme had been medically diagnosed and the reference to Down's Syndrome and cerebral palsy, in my descriptions above, simply reflected what I felt most likely characterised the prime source of their difficulties and from consulting David Werner's invaluable book, *Disabled Village Children* (Werner, 1988).

There are several important aspects of the local cultural and social practices that we might also read from this quantitative information. For example, from the fairly equal number of boys to girls who were referred to the Programme, it would seem to suggest that, in northern Namibia, families were equally concerned to seek support for their children regardless of whether or not the child was male or female, unlike as reported in some other cultures, where it is claimed the care of boys is favoured over that of girls (Miller, 1987).

In addition to the three children with cerebral palsy that we encountered in the Programme, we heard of others who were involved with the ELCIN Rehabilitation Centre CBR programme operating from Oniipa. This also seems to run counter to Helander's (1992, p. 131) suggestion that children with cerebral palsy "are now rare in



the developing countries, possibly because of their high mortality rate". Perhaps this further demonstrates the fallibility of global statistics and questions their use to shape globally applicable solutions.

The reader will also note, from the ages of the children whose families were enrolled in the Programme, that, despite all of our efforts to work closely with the health staff at the local clinics and hospital, and from our encouragement of families at the special needs surveys, we received very few referrals of children below the age of five years. I cannot explain why this was so, except to conjecture that the children's families may have initially explained any problems that their babies may have had as related to illness. Perhaps the slower development of some children may not have caused any significant concerns until after several years, when the families found the children much more difficult to manage, or when their child's development was more obviously being outstripped, by children who were born later than the child with the disability. Conceivably, Namibian families may also have a different understanding of the process of development or of the whole concept itself, and the notion of slow progressive changes over time may not be one that was conceptually shared by many local families. However, from my working alongside the Portage Visitors and other colleagues at the Engela Training Centre, several of whom were also mothers, they did demonstrate an understanding of child development which appeared not to be so dissimilar from my own Western view. It may have also been possible that, as some of the children had a number of carers within their family, including being supervised by other sometimes quite young children, that the lack of development (from a Western perspective) of the child with a disability may have been less apparent.

Clearly the older age range of the children who participated in the Engela Portage Programme represented a departure from how Portage programmes are usually envisaged and it certainly differed from my previous experience of Portage within the United Kingdom. Typically, Portage is described as an early intervention programme. However, our extension in the use of Portage to work with older children is not unique. Thorburn (1994a), for example, has described how Portage programmes implemented within Jamaica also supported older children, in areas where there were few or no services for children with developmental delay.



*The Members Of The Family Who Taught The Children*

Throughout my descriptions of the Engela Portage Programme, I have tended to refer to the children's *families*, rather than to their *parents*. This is because, within most northern Namibian households, we found that the primary carers for children could be their grandmothers, mothers, brothers and sisters, or some other member of the extended family and even, in one case, the 'home help'. Many research articles and reports concerning Portage and other home-based intervention programmes tend to refer frequently to 'parents' as being the key carers within the family home. Perhaps this represents the taken-for-granted assumptions of the reports' authors, rather than the actual circumstances within the family in which the supported children live.

Our experience, gained from working with local families who were enrolled in the Engela Portage Programme, was that, although the children's mothers represented the largest single group of carers (about 30 percent of the family teaching members), in most cases responsibility for teaching the child fell to another member of the child's family. Indeed, certainly in rural northern Namibia, one would be mistaken to assume that 'parents', as we might generally conceptualise within the West, had overall responsibility for their children. In traditional northern Namibian culture, the child is primarily the responsibility of his or her mother and the mother's brother (usually the eldest brother). While the father traditionally has a lesser role, his wider family have very little involvement, if any, with the child. Clearly caution is necessary in making any presumptions about family life in any particular culture. However, all generalisations can be misleading, as was also illustrated by the fact that contrary to the supposed traditional 'norm' for families in northern Namibia that I have just described, in at least one of the families that we visited, it was the father who took on the role of the main carer for the child and who also acted as the child's Portage teacher.

We also found, within the families known to the Programme, that maternal grandmothers were almost as likely to take responsibility for teaching the children as the child's mother (again in approximately 30 percent of families). Ingstad et al. (1992), reported similar findings in rural Botswana, where, as in Namibia, the increasing migration of young men and women to the urban areas, and the increasing number of children born to single unmarried women, seemed to have led to maternal grandmothers becoming the head of many rural homesteads. Consequently, in designing Portage materials that were relevant



to local families, we had to ensure that these materials could be readily used by elderly women, many of who had not received any formal education and were consequently largely illiterate. Indeed, we found that some of these elderly women also had little exposure to Western ideas, as might even be encountered by local primary school children following their national and school curriculum. We also noted, for example, that pencil-control skills, which many Western and now non-Western children master at an early school age through exposure to the education system, were not something that some of the more elderly grandmothers had acquired. Occasionally, we discovered that we needed to provide some very basic tuition to these grandmothers, so as to help them to record a tick and a circle on the Activity Charts. For a very few of the grandmothers, simple pencil control skills proved so difficult to learn that we substituted coloured pencils, so that red scribbles in the appropriate Activity Chart box indicated the teaching target had been achieved and blue scribbles that it had not.

Siblings also took on the role of teacher. The children's brothers in two of the families visited, and sisters in about one in five of the families visited, were also occasionally the chosen member of the family who agreed to teach the child. In most of these cases, these were either brothers or sisters who attended school (usually primary) or those who had recently left school and now helped maintain the homestead. Sometimes a child's brother or sister was identified as the Portage teaching family member because their mother or grandmother felt that she would be too busy, although I suspect that often this might have been due to the child's brother or sister being the most literate member of the family, having received the better (or at least more recent) education. Perhaps the involvement of siblings represents a further indication of how children with disabilities were not excluded from family life, when the possibility for their inclusion was shown to families. The involvement of the children's brothers and sisters seemed to run contrary to Mittler, et al.'s (1986) suggestion that many parents do not wish to involve the disabled child's siblings in detailed programmes of stimulation and training.

Shah (1990), also in contrast to Mittler, found that brothers and sisters were frequently the key caretakers in homes in India, as well as other members of the child's family apart from mothers, many of whom Shah found were busy with paid work away from the home. Again, this suggests that experts may need to question the implicit and, sometimes, explicit assumptions that mothers or parents will form the key carers in



Western designed support programmes or that the circumstances within an individual family actually follow the local cultural family norms.

In most cases, the person chosen to teach the child elected themselves during the initial assessment home visit. These initial visits were usually well attended by the child's immediate family, who listened to and contributed questions about the nature of the Programme, and who also responded to our questions, such as about the child. I think that one of the possible strengths of this process was that all of the child's family began to develop an interest in the child's education. Again, perhaps the fact that we ourselves were showing such an interest in the child may have helped to both raise the status of the child in the minds of some of the family and to have encouraged them to reconsider the child's broader social needs.

Over the two-year period of the Engela Portage Programme, in only a few families did the teaching role switch from one member to another, such as when the initial teacher was absent from the home for an extended period. Perhaps this suggests that the families valued the Programme and that they were keen to adhere to the condition we set, that there should always be someone at home to meet with the Portage Visitor and to take responsibility for teaching. Despite their own difficulties, all of the families proved to be very committed to working with their children and, for most of the time, did not find the time they had to devote to the Programme too onerous. As a further evaluative point, I think we could also claim that, with such a broad spectrum of family members who were both interested and able to take responsibility for teaching within the Programme, and because the Programme remained relevant to local families, we were generally successful in ensuring that the Programme took account of the wider needs and differing circumstances of many local families.

### *Visiting The Children's Families*

Reviewing the Activity Charts returned from families, from March 1993 through to December 1994, revealed that the Engela Portage Visitors made over 900 home visits. This represents a wealth of experience that the Portage Visitors were able to amass through their engagement with local families. Clearly, however, not all visits resulted in the children being taught the agreed skill, as there were occasionally problems encountered, which I will describe below. However, despite these inevitable difficulties,



in over three-quarters of the home visits, the agreed family member worked with and taught the child within the home and completed the Activity Chart following the visits. I think this compares fairly favourable with findings in other Portage programmes. For example, Smith et al. (1977, quoted in Sturmev and Crisp, 1986) reported that parents carried out approximately 81% of possible teaching trials (range 58-95%) and McConachie, (1991) noted that parents managed to carry out suggested play sessions on 62% of the available days.

Overall, I feel that, as the great majority of the families chose to continue with the Engela Portage Programme, with a significant number supported for over 12 months, this seems to suggest that the families found the Programme positively helpful and practicable. Of course, in many ways the families had selected themselves and so we were probably starting with a genuinely highly motivated group. That is, initially the families had to have at least sufficient interest to come along to the special needs surveys. Afterwards, the families had also to agree to take part, once the nature of the Programme had been explained to them. However, once the Programme commenced, the families were required to regularly ensure that they were at home when the Portage Visitor called and to ensure that the Activity Charts were completed each week, week after week. This, I believe, called for a high degree of commitment from the families. The families always had the option to withdraw at any time from the Programme, either through directly discussing this with the Portage Visitors or through indirectly 'failing' to complete the Activity Charts or simply not being at home at the time of the visit. Indeed, elsewhere in Africa (AMREF, 1987, quoted in O'Toole, 1991), families have proven less enthusiastic about their longer term involvement in home-based programmes, with their initial enthusiasm subsiding to a level such that family members were often absent from the home when the home-visitor called.

### *Disruptions To The Teaching Programme*

Reviewing the general literature regarding Portage and home-based teaching programmes internationally, I have been surprised to find that little reference is made to the specific nature of disruptions to teaching programmes. Given that over three-quarters of our visits were followed by some teaching of the child by their families, it is interesting to analyse the reasons which accounted for the remainder of the visits, following which no teaching took place. Intuitively, one might surmise that, given the



reported additional strains and pressures that families with children who have disabilities supposedly experience, this might account for the disturbance to programmes (Beresford, 1994; McConachie, 1994).

From feedback recorded on the returned Activity Charts, and from the reports of the Portage Visitors, including the explanations given to them by the family of the child, we found that the most frequent single cause for disruption to the planned teaching programme related to the illness of the child being supported. Sickness and death intrude far more into the lives of families and children in northern Namibia than would be expected in most 'developed' countries, and these disruptions are clearly likely to have a significant impact upon any home-based visiting programme in rural Africa generally. Official Namibian primary health care figures (Ministry of Health and Social Services, 1991) suggested that the infant mortality rate in Namibia was on average 103 per 1000 live births, although this figure could be much higher in some rural areas of the country. In addition, high rates for severe and moderate malnutrition were also estimated to be 6 percent and 23 percent respectively, and served to further undermine children's health. The high morbidity and mortality rates were said to result from common illnesses such as malaria, measles, diarrhoea, acute respiratory infections, tuberculosis, etc., all of which remained prevalent locally, particularly as the national plans for an infant immunisation programme were still at an early stage. The report also quoted that, in one survey of the Ovamboland region in which the Engela Training Centre was sited, of the 1746 children in the survey, 68 percent were reported to have been sick in the previous 14 days. Given that we were working with children whose disabilities rendered them more susceptible to illnesses, the high incidence of child illness and the consequent disruption to teaching should come as no surprise.

Likewise, we might expect that adults living within this region, whether family members whose illness accounted for 10 percent of disruption to teaching, or Portage Visitors, would also be more susceptible to illness. However, although illness did occur among the Portage Visitors, it only accounted for approximately just under half of the explanations of why the Portage Visitors themselves were prevented from visiting the families and thereby disrupting the following week's teaching programme. Members of the Portage staff were more likely to be unable to visit the family (accounting for 14 percent of the disruption to teaching) because they had been called to attend Engela



Training Centre staff meetings, which we were all generally obliged to attend. These meetings were usually called at very short notice and operationally these unscheduled meetings created difficulties for the Engela Portage Programme, as we rarely had the opportunity to notify families that we would be unable to visit as expected or, when we were working with a full 'case-load', to arrange alternative visits. On other occasions, the Portage Visitors were prevented from visiting the children's homes, due to severe weather conditions. Despite the generally arid nature of the region, severe flooding did occasionally occur and this tended to have a significant impact, by limiting travel within the region.

Related to family illness was the fact that illness in Namibia often necessitated a member of the patient's family attending hospital with the patient, to provide and prepare the patient's food, and to accompany them to and from hospital. With the high prevalence of disease and the lack of primary care facilities, hospital attendance was fairly frequent for many families.

Despite my initial concerns that a home-visiting programme might not prove feasible, due to competing domestic chores within a traditional homestead, field work, which became particularly intensive at harvest time, did not appear to present a major obstacle for families and only accounted for about 10 percent of the explanations of why teaching did not take place.

Church festivals, attending funerals and school duties were also occasional explanations for disruption, accounting also for about 10 percent of the claimed reasons. As several of the teaching family members were the children's brothers or sisters, most of whom were of school age, at times their preparation for examinations meant that they could not spend as much time teaching the children. Within this region of Namibia, it was also customary for funeral ceremonies to take place over several days, which meant that the attending relatives would not only usually have to travel some distance but also that they might be away from the homestead for some time.

On other occasions, again accounting for about 10 percent, we found that the teaching family member was absent without an explanation being given.



Our records also indicated that Portage teaching did not take place due to a range of other difficulties within the family. These included: the family being without food or water, which understandably took priority in terms of their immediate concerns; the child being unwilling to take part in the teaching; the Activity Chart being lost; the pencil being lost (pencils, in some households, were not a common object and we usually provided these to families, although they could, quite naturally find their way into the school-bags of some of the other children within the family); and the family moving house. Moving house was a relatively frequent occurrence, as, every few years, local homesteads would be dissembled and moved to a clean site.

We also found, and came to necessarily understand, that on many occasions while teaching did not halt altogether, it could not be sustained at the level we had thought as optimal during our early understanding of the Programme. Initially, we had thought four teaching sessions a day might prove practical for families and helpful for the children. However, as we began to re-conceptualise the prime aim of the Programme as related to social interaction, and as I began to reconstruct my understanding, away from concerns with the rate and the number of skills learned by the children, we developed a much greater tolerance of variation in this pattern.

The independent evaluation of the Engela Portage Programme in 1995 (MHSS and EAIHP, 1995), also noted a wide range of practice within the homes of the families that they interviewed. Some families taught their children for four sessions each day as anticipated by the Programme, while others taught only twice each week. In many respects, this is not so different from the experience of families engaged with Portage within the West. Indeed, McConachie (1991, p. 134) cautioned that, when providing support to families with children with special educational needs, “daily sessions should not be expected” as “some parents will....have rather different interaction habits and philosophy, and professionals will need to be open to adapting their strategies”.

### *The Range Of Skills Taught To The Children Enrolled In The Programme*

As a result of their involvement in the Programme, the children were taught a range of skills, both those taken from the Engela Portage Checklist and also in relation to other needs that they presented, which were not necessarily listed on the Checklist. Reviewing the returned Activity Charts for the twenty-eight children whose families were enrolled



in the Programme between March 1993 to December 1994, revealed a diverse range of skills being taught.

Self-help skills represented the single largest group of skills that the families opted to teach their children and accounted for about one third of all skills taught to the children. This group of skills included teaching the children to dress, wash themselves, to wash their clothes, to use a pit-latrine or the appropriate spot within the bush, etc. Perhaps this might have been expected, as helping individual children with dressing, washing, toileting, and so forth, probably placed a considerable demand on the time of the children's carers, and any improvement in the children's own skills might have therefore been welcomed, if only in terms of the time that was saved. Following the teaching of self-help skills, a quarter of the skills taught fell within what the Checklist referred to as 'Thinking Skills'. Popular teaching targets chosen by the children's families from this group of skills were educational skills, such as rote and one-to-one correspondence counting and also teaching the child to write their first name, either by copying a model or from memory.

About one fifth of skills taught were physical skills and, as might also be expected, these were usually chosen by families whose children had significant physical difficulties such as cerebral palsy. Language skills, such as naming other members of the family or naming animals, were also popular skills that families chose and these accounted for about one-fifth of the chosen skills. Interestingly very few families over this period opted to teach their children skills that would enable them to help at home, although one family wanted help to teach their child to pound meal, a frequent activity for adults and children alike in most local homes.

I have included this information, concerning the range of skills taught to the children, so as to provide the reader with some understanding of the teaching that took place over the period of my involvement. However, I think some caution has to be read into any attempts at interpreting the pattern of skills as necessarily typical or leading to any generalisations regarding teaching priorities within local families. Inevitably, the range and frequency of skills taught will vary with the presenting nature of the difficulties of the children supported by the Engela Portage Programme at any one time. That is, I do not believe that the range of skills taught necessarily informs us about the priorities of



local families generally, or of the preferences of the Portage Visitors, or whether Portage is more or less suitable for teaching specific types of skills over others. For example, it seems likely to conclude that, had the Programme supported fewer children with physical difficulties over this period, one would expect fewer physical skills to have been taught, or conversely more physical skills, had we enrolled more children with physical problems such as cerebral palsy.

The relatively high frequency of teaching 'Thinking Skills' within the Engela Portage Programme was also questioned by the independent evaluation of the Engela Portage Programme in 1995 (MHSS and EAIHP, 1995). The independent evaluation found, rather similar to our own findings, that about 29 percent of teaching focused upon cognitive skills, compared to 34 percent on self-help skills. The independent survey felt that this proportion of cognitive skills was too high and that, in their expert opinion, "functional age appropriate tasks are more useful in everyday life" (p 11). I believe that these criticisms of the Engela Portage Programme rather overlooked three very important points concerning the nature of the Programme's intervention.

Firstly, as I have mentioned previously, during the course of 1994, my colleagues and I came to re-conceptualise how the Engela Portage Programme might most usefully effect some improved changes in the lives of local children with severe learning difficulties. We conceived the focus of the Programme shifting away from one which primarily led to a concern with the number and rate of 'developmental gains', to one which we believed fostered more constructive family relationships. This represented a change from a predominately child-centred emphasis in the Programme to one that considered the family perspective. Consequently, we were less concerned with the particular skills (whether academic, self-help, etc.) that the children's families chose to teach their children, than with the fact that, by families being engaged within the Programme, we were able to encourage them to spend more of what might euphemistically be called in the West 'quality' interaction time with the children themselves.

Nevertheless, I can understand this particular concern with rates of learning, and the assurance that children are learning those important skills that experts presuppose to be necessary and in their best interests, as this was part of my own professional perspective when I first arrived at the Engela Training Centre. However, I began to appreciate that,



if we think in terms of numbers and improvement rates, we almost inevitably tend to become too focused upon measurable ‘outcomes’ as symbols of progress and improvement, while tending to overlook the important interpersonal and social relational processes of any programme. I began to understand that what was most significant locally was that we managed to keep the enrolled families interested in and keen to remain part of the Programme, and that we taught the families further ways in which they might relate to their children. Chief among the Programme’s aims was to try to foster and maintain a ‘positive’ supportive atmosphere for both the family and the child.

Secondly, we were particularly concerned to ensure that the children’s families had a voice concerning their children’s education. ‘Partnership’ represents one of the buzz-words associated with many interventions and community initiatives currently within the United Kingdom, and indeed international, educational and health discourses generally (Mittler and Mittler, 1982). And yet, for partnership to be effectively enacted, rather than to simply represent an empty slogan, surely this entails that the associated processes of collaboration, negotiation and compromise form the key principals under which the relationship with the children’s families is developed. Consequently, programmes which purport to work in collaboration with parents and families, such as Portage and other contemporary intervention programmes, surely need to acknowledge that professionals will have to also accept that the teaching targets they might themselves believe are more immediately appropriate for an individual child might not be the targets that are of prime concern to the child’s family. Reviews of Portage programmes generally have noted the importance that:

“skills can be apportioned according to the value that caregivers place upon them.....their views should be actively considered in selecting a goal if treatment compliance is to be ensured” (Sturmey and Crisp, 1986, p. 145).

My experience with the Engela Portage Programme in Namibia was that the children’s families, while valuing the need to teach their children self-help skills, were also concerned that their children learned some basic educational skills too. As I have commented above in reference to the suggestion that children be taught ecologically valid, functional skills as recommended by Baine (1988), this rather overlooks the fact that the children’s families, those who are actually teaching the children on a daily basis, have to decide what is most meaningful to them.



I think that a pre-occupation and privileging of so called appropriate teaching targets, functional, educational or otherwise, not only reflects a lack of understanding about the practical realities of 'partnership', but also perhaps neglects to acknowledge that children are not isolated objects of intervention or study. Children are primarily part of a dynamic, often unique, highly variable social context. Helander (1992, p. 122), in reference to the range of CBR options which he felt might be considered, put this notion very simply, claiming that "People who are well motivated and want to proceed following their own ideas should be encouraged". I think that this is often too readily over-looked by educational experts who, through seeking tidy packages to implement efficiently, become perhaps also less tolerant of diversity and the consideration of alternative developmental routes. Again, I feel we are returning to the tensions between the archetypal modernist perspective, esteemed by some experts who are primarily concerned with outcomes and the exercise of their own authority, and that of those experts who value the more pluralistic, postmodern concerns with process, by which they are able to put aside their assumptions of some transcendent 'expert-knows-best' superiority.

Related to the over-emphasis on teaching as part of a programme is a further concern raised by O'Toole (1991). O'Toole cautioned that programmes needed to be concerned that parents might become upset and disillusioned by the apparent lack of success of their own teaching. I am convinced that this is probably more likely to occur if the supporting programme defines itself primarily by the degree of 'measurable' teaching outcomes that it achieves with individual children. Typical of such approaches are the use of pre and post teaching comparisons of children's gains regarding earlier teaching targets or their progress on standardised development or intelligence tests. I believe that this type of empiricist approach may risk encouraging the children's families to also become unhelpfully aware that the expert is concerned with measurable gains and performance indicators and with notions of testing and measurement, and that this may perhaps lead families also to become over-concerned with what they perceive to be their own ability, or lack of it, to 'formally' teach their children.

Whatever, I think that we can fairly confidently conclude, as I shall discuss below when reviewing the views of the families, that at least those families who were involved with



the Engela Portage Programme did not seem to become disillusioned with any lack of progress of their children or concerned that they and their children were not benefiting from their involvement in the Programme.

Thirdly, in relation to the Programme's shift in emphasis, from child-centred to family centred, we were also less concerned with the higher proportion of educational skills taught, as teaching of any form provided us with the vehicle for engaging with and visiting the families. I believe that, by visiting families regularly and offering genuine positive advice and listening to their concerns, we had a beneficial effect upon the quality of the relationship that later developed between the families and their children with severe learning difficulties. It is difficult to 'prove' or to quantify these aspects of the Programme, as these less tangible beneficial aspects have no objective measurements to which we can refer. However, throughout the course of the Programme's implementation, we were regularly receiving positive comments from the children's families, which indicated that they found our visits generally supportive. In addition the independent evaluation of the Engela Portage Programme itself commented that the children had shown 'clear' progress and that the 'quality of life' of the children had improved through their involvement with the Engela Portage Programme. The evaluation report also noted that:

"The attitudes of many families changed since the start of the EPP. As told by the families the children with disabilities were more accepted and appeared to be more participating in activities at home and their home situation improved" (MHSS and EAIHP, 1995, p. 13).

O'Toole (1991, p. 46) also came to similar conclusions about the value of CBR workers simply visiting family homes and this leading to beneficial and "significant effect on the way the mother treated the child" and how this itself, "highlights the limitations of simply focusing on a structured teaching programme". I would whole-heartedly agree with O'Toole that "the value of the programme may lie as much in the relationship between the Portage Visitors and the family members as in the specifics of the practical intervention which they propose" (p. 46).

### *A Broader Evaluation Of The Programme*

While home-based teaching programmes have stressed the role of parents and their parental involvement components, I feel that it is unfortunate that so many evaluations



continued to focus on changes within the child, rather than consider broader forms of evaluation.

For example, despite the overall positive endorsement by the independent evaluation of the Engela Portage Programme, (MHSS and EAIHP, 1995) which suggested that, “the study shows that good results can be achieved for children with severe learning difficulties through this type of family support” (p. 4); and “the programme is found to be relevant and well established. The impact upon individual families is generally good and they know now how to take better care of their children” (p. 14); the Programme was also felt to also have a number of weaknesses. The weaknesses identified by the independent evaluation seemed to largely relate to concerns with the Engela Portage Programme’s ability to maintain precise recording keeping; the, what they believed to be, lack of ongoing training of the Portage Visitors; the regular interruptions to the teaching programme; and the lack of clarity in the teaching process, such that “teaching targets are not often reached and are repeated again” (p. 15).

While some of the specific conclusions of the independent evaluation study can be accepted, others could be questioned. For example, it is apparent that the main criticisms of the independent evaluation seemed to relate to issues of technical precision, the specific educational content and the effectiveness of the teaching techniques used to teach the children skills, which could allow accurate and unambiguous measurement and recording. Again, child-centred teaching and ‘size of effect’ appear to have been privileged over broader and less tangible ‘soft data’, such as that related to the views of the children’s families and the views of those implementing the Programme locally.

However, even within the West, there now also seems to be a growing acknowledgement that, while early intervention for children with learning difficulties is seen as leading to positive skill gains, these, despite highly scripted programmes and technical precision, are sometimes modest at best (Dunst, 1986; Guralnick, 1991). This appears to be particularly so for children with more severe difficulties and for those families living under especially stressful conditions. Indeed, some reports have concluded that, with regard to such skill gains, there is in effect very little conclusive evidence for the superiority of any one form of home based intervention programme over others (Mental Health Foundation, 1997).



Some researchers involved with supporting families with children with disabilities have also called for a re-emphasis, from primary concerns with teaching to those of family relationships. Gallagher (1992) argued that the most effective programmes were those which created a sense of positive optimism within families and which provided encouragement, rather than those that focused on content and technique. McConkey (1994b), from his experience of working with families in developing countries, also identified creating a positive, optimistic spirit within families, and promoting enjoyable interactions between the child and their family, as crucial elements of working with families. Within home based intervention programmes generally, (Guralnick, 1989, 1990) and within Portage specifically (Cameron, 1997), there has also been a recognised shift of emphasis from somewhat narrow teaching measurements to a re-conceptualisation of the role and importance of family relationships.

As with my own transformations in understanding related to the Engela Portage Programme, it seems that there is a growing body of opinion that such intervention is now thought to be most valuable if it is directed towards primarily strengthening family-child relationships, rather than encouraging parents to assume therapeutic or educational roles, as these roles often require didactic activities similar to those of professionals. While this view had been expressed for some time, it is only fairly recently that it has begun to take a more central position in the discourse concerning home-based teaching. Examples of earlier acknowledgements of relationship issues included, Affleck et al., (1982) who claimed that home-based teaching interventions that encouraged positive, warm parent-child interactions and also promote parent problem solving skills were most promising. Sturmey and Crisp (1986) had also earlier suggested that research into Portage should now take on a far broader view of the possible effects of Portage on the child and the family.

Overall it seems as if the field of home-based intervention is now witnessing a gradual transition from an earlier family *orientated* approach, where families were effectively seen as the instruments for vicariously conducting teaching, to more truly family *focused* programmes. However, there appears to remain plenty of scope for the further recognition of the significance of families and for Portage programmes to refine the processes they employ, to ensure that they are more fully family 'friendly'.



Given this general shift in concerns regarding evaluation, what then might be more appropriate questions that an evaluation could ask? Concerning the Engela Portage Programme, I came to understand how its effectiveness might be crucially judged by its success in two areas. Firstly, it was clearly important to ascertain the degree of family involvement that it engendered. By family involvement, I am primarily referring to whether families were happy to participate in the Programme, as judged by their views and whether it effected some change in the families. Secondly, I felt that any evaluation must also essentially consider the degree of support for the Programme from those charged with implementing it, i.e. the Portage Visitors, and whether they valued the training that they received and whether they felt satisfied with their role and positive about the Programme generally. I will discuss both of these aspects of the Programme's evaluation below.

### *Involving Local Families - Their Views*

The mainstay for our confidence in asserting that the Engela Portage Programme was effective locally stemmed from the continued engagement and the positive comments that we received from the children's families. While their views were sought throughout our involvement with the families, towards the end of 1994 we also decided, with the impending possibility of further funding, that we might usefully collect the views of the families more formally.

Following discussion with my colleagues, we drew up a series of questions, which they believed should be addressed to the children's families, the answers to which they were particularly interested in recording. In December 1994, my counterpart accompanied the Portage Visitors on home-visits to fifteen of the families who were then enrolled in the Programme, and she tape-recorded their response to our questions. When we completed the survey, all of the responses from the families were also translated into English by my counterpart for my convenience.

Clearly, this was hardly an 'objective' scientific survey of family responses as it was conducted by ourselves with families most of whom had been closely involved with the Programme for many months. Likewise, even if we had thought a 'scientific' survey appropriate, we did not have the resources or time to establish questionnaire reliability or



validity. However, the survey was foremost designed to address our own curiosity and concerns as to how we might improve upon the Programme, prior to the extensions planned later in 1995, and it was not planned specifically to convince others about the merits of the Programme.

The questions that the Portage team chose were all fairly directly related to the concrete practicalities of trying to implement Portage, and did not include more searching and complex questions, such as those about any subtle changes that the family may have noted in the relationship that they had developed with their children. In part I think that the absence of relationship focused questions might probably have reflected my colleagues' concerns that such abstract questions may not have been culturally as straightforward for the families to answer or possibly for them to ask. I believe that it is also important to remember that the families who participated in the Programme, although they were presumably accustomed to the Portage Visitors asking them direct questions, might not have been familiar with the style of 'quality control' questions or the presence of a tape recorder. Indeed, reflecting upon the responses of the families to the questions revealed that the Portage Visitors themselves were also unaccustomed to asking such 'formal' questions of families, and this may have added to the rather stilted nature of the family interviews.

Also, I think that it is important to consider that, from my own experience, it appeared local people tended to be generally very courteous and thankful for whatever support they received. As I have discussed earlier, I found it personally very difficult, certainly initially and until we had built up a more trusting working relationship, to entice any criticism from my Departmental colleagues, or others at the Engela Training Centre, concerning my role and the Programme's progress. Additionally, as the Engela Portage Programme was the only local provision, families consequently had very little or nothing at all with which to compare it. Finally, it is also possible that some families may even have refrained from expressing any negative opinions, due to a fear that the Programme might have been withdrawn from them.

Below I have summarised the responses of the families to each of the questions addressed to them about the Programme. Where appropriate, I have occasionally quoted



verbatim the English translation of the families responses and commented about issues raised by the questions and responses.

Obviously as a team we were keen initially to know what the families thought about the Programme, what they liked and also what they disliked. When asked what they liked about Portage, all of the fifteen families identified the educational aspects of the Programme. The families' replies as to why they liked the Programme were typically such as, "it teaches and educates children"; "I like Portage because it educates and teaches them well"; "I like the Portage about the way of giving the instructions to our children and education"; "I like the Portage with the good luck because it helped my child"; and "I say thanks for the Portage because my child didn't know how to say things but now he can try to say some of the things".

It seems therefore that the families chiefly described the benefits of Portage in terms of the skills that their children had acquired, rather than the nature of any changed relationship they might have established with their children. Likewise, they did not mention, in response to this question, their valuing the wider social and 'emotional' support that they might have received from the Portage Visitors. Perhaps this was to be expected. As I have described already, we saw the educational aspects of the Programme as the 'vehicle', or the explanatory narrative, for helping to improve the social relations, within the family, for the child with the disability. However, the families may not have perceived that they were acting differently toward their children in a broader social sense, although I would claim that this inevitably had to have happened, if the children were interacting with the family more frequently and more directly 'educationally'.

Of course the 'flip-side' of the above question was to then ask the families what they did not like about Portage. Unfortunately, all of the replies to this question were generally positive. Again, I think that this rather demonstrates the cultural reticence of local families to criticise, rather than demonstrating the lack of any problems and difficulties that the Programme, at least occasionally, must have presented for the families concerned.

Concerned with the ongoing development of the Programme, we also asked the families how we might improve Portage. Amongst the replies, I particularly appreciated the



response of one family who suggested that “we have to work with it in order to improve it”, which, to my understanding implied improvements were possible and that these might be resolved dynamically through ongoing practice. Unfortunately, the Portage Visitor did not probe deeper with this family, so any specific areas for improvement were not identified. Some of the other responses we received also seemed to imply that the families understood this question to be about the continuation, or not, of the Programme. If so, had we had the opportunity to conduct a pilot questionnaire, such confusion over some of the questions might have been avoided. However, given that the Portage Visitors who identified this as a worthwhile question were also asking the question, they might have rephrased the questions themselves to the families. Interestingly, none did. Again, this may say more about the questionable appropriateness of this form of information collecting than it does about the perceived areas of improvement for the Engela Portage Programme.

As I have mentioned above, one of my earlier concerns had been with the issue of recording teaching outcomes, whether it was feasible locally or even whether it was necessary at all. Consequently, the families were all asked what they thought about the Activity Chart. Again, most of the children’s families responded positively, suggesting that the Chart was useful and easy to follow, although one family expressed concerns about the number of teaching sessions that they might be able to meet during harvesting time. The independent evaluation of the Engela Portage Programme also commented on the positive responses by all of the families interviewed, when asked about the Chart, although they added that, in very few of the families visited, was the Chart recorded correctly at the time of the visit. This seems to tally with our own experiences that, while many of the families did seem to find the Chart helpful and understood how to record, this was not always done accurately. However, while we were not unduly concerned, as we realised the Chart had wider uses mentioned above, the independent evaluation felt that this was a weakness of the Engela Portage Programme.

Concerning the usefulness of the Chart, from our own experience, we were also very aware that many of the families seemed to rely heavily upon the verbal directions and the modelling of the teaching sessions that took place during the home-visit. I suspect that while some families did refer to the Chart for instructions during the later teaching



sessions with the child, most recalled the short practical teaching session that they had earlier shared with the Portage Visitor.

Also related to the Chart, we were interested in how long it had taken the families to begin to understand its use, if indeed they did at all. For the purpose of our own evaluation, this question was perhaps a little more revealing, in that several of the families suggested that their coming to understand the use of the Chart took some time. Clearly, at least one family did have difficulty using the Chart reporting “it took me some long time” and some only marginally so stating for example “it takes some times but not so much and we say thanks for that opportunity” or “No, only a little because I know how to give ticks and to record”.

Again, as might be expected in any society, the local families enrolled in the Programme represented a diverse group concerning, for example, their educational levels and experiences. As I have described, some of the children’s ‘teachers’ benefited from some simple coaching of their pencil control skills by the Portage Visitors, before they were confidently able to form a tick or to colour in a square on the Chart. However, other families had fewer difficulties with one claiming for example, “The day I was given the Chart was the day I understood it. Because I can see and I know how to read”, apparently finding the task very straightforward.

As I have mentioned within the review of the Portage research literature, one of the key issues raised regarding most home-based special needs programmes, particularly those implemented in developing countries, concerns the ability of families to put aside sufficient time to carry out the programme with their children. Consequently, we were also keen to hear from families about whether they too had enough time to teach their children. Most of the families questioned replied that there was sufficient time to teach their children, although a few implied that the teaching did compete with other activities. For example, one family member stated that they “have a time if I didn’t go to walk around” and another family member claimed “I have enough time when I have finished my works I have to teach the child”.

However, one family did clearly indicate that time was a difficulty stating “I have a problem because I will have a lot to do and I won’t be very careful to look after the time



that I was given to teach the child” as did another who clearly reported “I don’t have enough time”. These two families who described finding the time to teach their child a problem on further questioning gave various reasons. In one of the families this seemed to have been related to both ill health on the part of the family member and their having to care for other children within the family, and in the other family this problem was attributed to “work”. Two further families also mentioned their being absent from the home and “ploughing” as also limiting some of the time available to teach.

Of course, a lack of time might not represent the only potential barrier to teaching within the home. Consequently, we also asked each of the families about the main difficulties they experienced when trying to teach their children as part of the Engela Portage Programme. The families’ responses to this question were comparatively more enlightening than the question about whether they had sufficient time or not. Although four of the families claimed to have no problems at all the other families highlighted a range of problems. Again, some of these problems were related to the restricted time available for teaching as mentioned above and one family felt that teaching the child twice a day was preferable to the suggested four sessions on the Activity Chart. Several families also made reference to difficulties directly related to the child, with one for example stating “some of the problems which I have is only when I am asking the child to do the things the child is denying”, or as in the case of another family that they had problems “at times when the child is hungry”.

While as a team we had come to shift our understanding about the benefits and purposes of the Engela Portage Programme as primarily related to improving the relationship between the carers and children with special needs, we also realised that most families probably understood the Programme to be about their children’s progress. So an obvious and important question we had to address to the families was whether they felt their children were improving as a result of their participation in the Programme. With only one exception, all of the families described how their children had made some progress since joining the Programme. Most referred directly to the skills that they felt their children had learned as evidence of the progress. Two families attributed the progress to a change in their own skills related to the support they were receiving from the Programme, one claiming “the progress of the child is because of the good teaching she gets because before I was not doing anything, I didn’t know”, and another that “yes, I



think she has made good progress because of some of the teaching that you are doing”.

However, one family replied “how can you ask me for the progress? Only God can tell the child to lay down and also when I am absent so I can’t teach”. The child in question was a little boy with very severe cerebral palsy, who had been involved with the Programme since the pilot. It may have been that the family did not want to claim directly that they felt a concern with the child’s lack of progress and thereby risk criticising the Portage Visitor or the Programme, but left that to the judgement of God!

As the reader will be aware, although as a team we raised the issue of how long families should remain supported by the Programme, this question was never satisfactorily resolved. Nevertheless, it was recognised that whether due to the children reaching some agreed ‘cut-off’ age, or simply due to a withdraw of funding, the Programme would inevitably cease at some time. Consequently, we were also curious as to what the families thought they would do when Portage came to an end and whether they would continue to teach their children. Of those families asked this question, most suggested that they would attempt to continue to teach their children, although some families indicated that this would only occur if guidance from others was available, or that they would seek a special school placement for their child.

Clearly we were not in a position to determine whether the positive intentions of families to continue working with the child in the manner advocated by Portage would have been actually realised in practice, as we had not withdrawn the Programme from any of the families over the two year period that the Programme was in operation.

I was very aware, at the start of the Programme, that those families we visited had nearly all expressed a preference for their children to attend a residential special school. Perhaps they had some good practical reasons for doing so. Families probably would have been aware that children who attended a Centre, such as the Engela Training Centre, would be likely to receive relatively good quality, regular meals and other material benefits, such as clothing, from which not only would the child benefit but also this would ensure that there was one less child to feed at home. Within the local culture, it is not unusual for children to be ‘adopted’ by others, either directly related to the family or simply by ‘namesake’ adoption. While most of the families we spoke to



probably had not visited the facilities at the Engela Training Centre, they may have expected the educational opportunities to be at least on par with that which children attending local school could expect to receive. Despite some clear methodological problems in our asking those families whose children were enrolled with the Programme for their current views about the Programme compared to residential facilities, we were curious to know whether they would still prefer their child to go to a residential centre or to continue with Portage.

Of those families asked the question, seven clearly claimed that they did not want their child to attend an institution, but wished to continue working with their child at home. One of these families even claimed that she only wanted Portage as “she was already in some of the institution and I have not seen any progress or any change”.

Several families reported that, while they wished to continue with Portage, if their child developed sufficiently, such that they might be accepted in a school, then this option would be considered. Interestingly, two of these families saw the child as eventually being able to enter a ‘normal’ school. Given the degree of severity of the difficulties that both of these children experienced, this may have suggested that the families felt confident about the likelihood of more widely available special needs provision within local schools at some future date; that they had very high expectations of their children’s progress; or even that they did not perceive their children’s difficulties as being as severe as others might have judged.

The replies of another two families implied that they felt their children would initially not be eligible for special school, either because they were too young or because of poor ‘health’ (the child concerned had profound cognitive, physical and hearing difficulties) which the family felt barred the child from even a special school placement. Some of the replies by the families also suggested that they perceived the Engela Portage Programme not as an alternative to special school, but as a programme designed for children with more severe difficulties which, once improved upon, might allow access to special schools.

In addition to the information that we gleaned from visiting the families and using our questionnaire, in November 1994 my counterpart also organised a weekend workshop



for twelve of the families who were enrolled in the Engela Portage Programme. Primarily, this workshop aimed to seek both the views of these families and also their support for the formation of a regional association of families with children who had severe learning difficulties. My counterpart was keen to encourage the children's families to meet as, within Namibia generally at that time, people with severe learning difficulties were not specifically represented by their own organisation. McConkey (1994a) also suggested that providing families with the opportunity to meet in groups, represented a further essential element in helping to share knowledge about children with disabilities and consequently offered a further source of support for families.

As part of the workshop, which looked at disability issues and provided the families with an opportunity to meet each other and share views, my counterpart was able to ascertain their opinions regarding the Programme. Again, the responses from the group of families seemed to confirm the views and insights of the other sources of feedback that we had received, such as incidentally during home-visits and from the questionnaire cited above, in that the families unanimously gave their support for the Programme.

While again aware of the methodological flaws in the use of these types of survey and questionnaires, particularly in the local northern Namibia context, following the completion of the survey, my colleagues did feel further reassured that they were providing a Programme that at least most families considered helpful and with which they wished to continue their involvement. Unfortunately, the lack of any detailed criticism from families made difficult the using of these sources of information to further fine tune and improve the Engela Portage Programme.

However, I have subsequently been a little more reassured about the positive feedback that we received from the families, as it appeared to be at least consistent with the later survey of families conducted by the independent evaluation of the Programme in November 1995 (MHSS and EAIHP, 1995). This survey, the design of which must have been open to many of the methodological concerns and criticisms of our own, suggested that, in general, the 10 families interviewed were positive about the Programme. Overall, the report claimed that:

“the team found based on the interviews and observations, that the programme since its start showed clear progress with many of the children. Indirectly it has



raised awareness about PWDs [people with disabilities] in the community. In general the quality of life of children enrolled by the EPP has improved. Another positive aspect of the EPP is that it stimulates families to assist their children in their development” (p 11, insertion added).

Also according to the independent survey, “Most of the respondents stated that the activities were easy to follow *and demonstrated them*” (p. 13, emphasis added). However, the survey also reported that while “Most of the respondents said that it was easy to fill in the charts for the family to assess the child”, that, “this was not systematically done or done at all. Only one out of ten had their chart correctly filled in” (p. 13). Again, I think that this serves to confirm how the verbal instructions, and the practical demonstration and modelling, by the Portage Visitors during the home visit, represented the most important aspect related to the ‘formal’ teaching component of the support, and that the Activity Chart, which occupied the attention and drew most criticism from the independent evaluation, was a secondary ‘prop’ to the wider support the family received.

However, the independent survey did try to fathom broader implications and effects of the Engela Portage Programme. The report suggested that:

“the attitudes of many of the families changed since the start of the EPP. As told by the families the children with disabilities were more accepted and appeared to be more participating in activities at home and their home situation improved” (p. 13).

One further question asked of families, by the independent evaluation team, was similar to that of our own survey, concerning what the families might do when Portage ceased, to which “all of the care-takers said that they would continue with the activities even when the EPV [Engela Portage Visitor] would not visit them any longer” (p. 14, insertion added).

### *The Portage Visitors’ Views*

Considering the views of those actively involved in implementing the Programme might be seen as representing a further aspect of the ‘soft data’ concerning the Programme’s evaluation. However, from an extensive review of the Portage literature and home-based programmes generally I have found few references to this actually occurring, either during the development of programmes or their later evaluation. While evidence abounds that recent studies have been conducted to consider the views of the children’s



families as a central part of any evaluation (e.g. Kwok, 1995), few appear to consider that evaluation might also necessarily include the feelings and comments of the home and community visitors. This is in spite of the fact that, for Portage and other home visiting or community programmes to be successful, the positive engagement of those directly delivering the service would seem essential. Whether home-visitors feel enthusiastic or disinterested, whether they work with confidence, conviction and flair, or with detached concern or doubtfulness, is likely to have a major impact on the overall effectiveness of any programme. Lysack and Krefting (1993, 1994) offer a notable exception to the general dearth of inquiry regarding this question, by recognising that the views of CBR volunteers and employees represent an essential element in determining the effectiveness of such programmes. With regard to CBR staff they suggested that "Their thoughts and feelings about commitment to CBR form the basis of their actions and thereby determine, at least in part, the success or failure of CBR programs" (Lysack and Krefting 1994, p. 96).

In general, references to those who actually visit families in the community as part of programmes appears to be restricted to details of their recruitment and training (e.g., Twible and Henley, 1993), and the participation, motivation and satisfaction of home visitors and community workers seems to often be simply assumed. Of course, potentially this neglect may also reinforce the view that home-based programmes are simply a means by which special support can be *dispensed*, rather than representing an opportunity for a collaborative process of *all* those involved.

This general absence of interest in the opinions of community volunteers and workers such as Portage Visitors also suggests that, while there has been an increasing interest in the social and relational aspects of programmes within the West, there may also commonly be quite a restrictive understanding of the systemic nature of relationships.

Nonetheless, I believe that the Portage Visitors' views were a very crucial consideration for the evaluation of the Engela Portage Programme, given the context in which I was working. Leach (1991) also suggested that problems with the implementation and acceptance of consultant inspired programmes in developing countries could result from a failure to adequately consider the views of local colleagues who actively deliver the programmes. However, ascertaining the views of my three colleagues directly presented



me with a significant challenge. Unlike Lysack and Krefting (1994) whose inquiry utilised focus groups and other interviews with a range of personnel, such approaches would have been nonsensical and inappropriate with my colleagues, given the small team that we were and the close working relationships that we inevitably developed.

Nonetheless, while the Engela Portage Programme could be criticised for its difficulties in ensuring evaluative rigour in the conventional empiricist sense, through it privileging practice over research methodology, the inevitable collaborative and systemic features of its development may offer an alternative form of evaluation. This rests upon the necessary mutual dependency of the relationship that existed between myself and my three other colleagues within Department Three. I found that I was in a position where I was crucially reliant upon their agreement and co-operation for the majority of the decisions that we took, at least if these subsequent actions were to have any opportunity for realisation. Consequently, concerning evaluation, one could argue that the entire development of the Engela Portage Programme, from its initiation to its eventual form, considerably depended upon their acquiescence and support. In effect, each stage of the Programme's development, from inception to my leaving, could be characterised as part of a continuous 'conversation' that I maintained with my colleagues. Explicitly, such as at team meetings and through informal conversations, and implicitly, throughout our day-to-day working, I found myself inevitably consulting with my colleagues over questions which centred upon their views of the Programme, my own role and theirs. There is an intrinsic and dynamic evaluative component to that process.

Consequently, I feel fairly confidently able to claim that the views of my colleagues were evident and invested in each step of the Programme's development. As I depended upon their agreement for the continuation of the Programme and my involvement, in such circumstances it could not have been otherwise. Nor would I have wished it to have been, as the nature of our relationship presented a valuable learning opportunity and also helped me to re-structure my expert practice, so as to ensure that we were able to keep such a 'conversation' going.

I think that it is fairly safe to claim that, while my colleagues may have concealed some concerns about the Programme they were overall genuinely very positive about it. I also believe that I can declare this by the fact that not only without their initial support would



the Programme never have developed, but also by their decision to choose to continue to operate the Programme and to further extend the number of families they worked with, even after I left the Engela Training Centre. Throughout their involvement, I was struck by the enthusiasm and commitment that my colleagues displayed, both in their day-to-day role and their willingness to demonstrate the Programme to the many visitors we received within the Department. This is not always the case when programmes have been initially devised by expatriate experts, which local staff are later expected to continue by themselves (Leach, 1991).

Discussion with my colleagues suggested that there were several key aspects of the Programme that they appreciated. Primarily, they valued the 'technology' of Portage, its problem-solving nature, its tangible teaching techniques and accompanying supportive materials. Furthermore, their active involvement in the adaptation and development of the materials, and the Engela Portage Programme generally, gave them a sense of 'ownership' in which, I believe, they felt considerable pride and allegiance to.

As they gained experience of working with more families and children with more diverse needs, I believe that the Portage Visitors gained confidence in their own ability to operate and develop the Programme themselves, and also achieved satisfaction from the positive feedback that they received from families and other community members alike. Within the Engela Training Centre, the fact that the focus of their work was in the homes of local families, that is within the community, also improved their status in the perception of other Engela Training Centre staff.

The difficulties that the Portage Visitors encountered appeared to be related to the physical challenges of their role, such as the considerable distances that they sometimes had to travel to visit individual families. At other times, they also expressed their concerns about the slow rate of progress of certain children. Such difficulties they usually attributed either to their own inability and suggested a need for more training, or, as was often the case, to problems within particular families which interrupted the teaching process. However, I think that the positive relationships that they were able to form with the families, and their awareness that the families appreciated their support, together with the encouragement I gave for them to view their role in wider terms,



beyond simply the rate of individual children's progress, went some way to helping them to address these concerns.

The Portage Visitors' views were also sought as part of the independent evaluation of the Engela Portage Programme. However, this evaluation included the opinions, not only of my three colleagues from within Department Three, but also those of the more recently recruited Portage Visitors as part of the FINNIDA funded extension. These Portage Visitors had not played a role in planning or developing the original Programme. It also appears that most of the questions asked of the Portage Visitors were more directly related to their understanding of the Programme's operation and technical details, rather than their personal feelings about the relevance and value of the Programme generally. Nevertheless the evaluation report claimed that:

“All of the EPVs reported successes with the programme: many children are now able to do activities which they could not do before....They noticed important changes towards PWDs [people with disabilities] in the family and communities. Within the families the child with disabilities is better accepted and the other children pay more attention to their disabled sibling....The people in the community encourage the EPVs to continue their work” (MHSS and EAIHP, 1995, p. 12).

The independent evaluation report also noted several areas where the Portage Visitors felt that improvements could be made. The report claimed that all of the Portage Visitors expressed a need to receive more training and that they also complained of being thirsty and hungry when working in the community. Some complained that their salary should be raised.

### *The Independent Evaluation Of The Engela Portage Programme In 1995*

As I have referred to above, in 1995, the Ministry of Health and Social Services and the Engela Area Integrated Health Project undertook an evaluation of the Engela Portage Programme (MHSS and EAIHP, 1995). At that time, the Programme had been receiving additional funding, for its extension beyond the Engela area, for just less than one year. Consequently, the FINNIDA which was also backing the EAIHP, and who had provided the financial resources for the extension, required an evaluation of the Programme prior to funding for a further year.



I have already made some references to the findings of the independent evaluation above, including their apparent interest in the quantitative aspects of the Engela Portage Programme's operation and my concern that those who conducted the operation had not appeared to value some of the wider and, perhaps, less readily quantifiable beneficial aspects of the Programme. Likewise, the evaluation team, which consisted of several individuals with strong interests in the local World Health Organisation CBR programme, appeared to evaluate the Programme in terms of aims which the Programme was not designed to meet, such as strengthening community-based activities. The Programme was designed to support families and not local communities, an objective which the locally inspired CBR programme itself was finding equally very challenging. As I believe the quote from the evaluation report's executive summary below may illustrate, the evaluation team also appeared to privilege a rather authoritarian model of professional supervision and oversight, which probably stemmed from their reported worries about the Programme's lack of concern for highly accurate record keeping and the storage of paper documentation. Nevertheless, despite my concerns that the evaluation team had not conceptually fully understood key aspects of the Programme, they were sufficiently supportive so as to agree to a further year's funding.

The independent evaluation concluded that:

"The study shows that good results can be achieved for children with severe learning difficulties through this type of family support.

This programme is cost effective compared to the support in residential institutions. However, related to other community-based activities, which usually are supported by volunteers, the expenditure is remarkable. It is not evident that community-based activities have been strengthened through this programme, since the EPP is working rather isolated in the community.

The EPP is functioning well but it still needs supervision and support from professionals. It can be noted that many of the good achievements of the EPP are probably attributed to the work and attitudes of the Engela portage supervisor and the EPVs who have promoted positive attitudes towards people with disabilities. Also small changes in the communities can be noted e.g. attitude, interest and awareness towards disability issues" (p. 4).



### **3.8. Postscript**

Since leaving the Engela Training Centre, I have maintained contact with friends and colleagues and have been able to monitor the progress of the Engela Portage Programme. My counterpart continued to work at the Engela Training Centre as Head of Department Three, and to manage the extended Engela Portage Programme until 1997, when the additional FINNIDA funding came to an end. While the Ministry of Lands, Resettlement and Rehabilitation, who had taken over management responsibility of the Engela Training Centre by that time, were unable to fund the extension, they were keen to continue to support the operation of the Programme in the Engela area. My counterpart left the Engela Training Centre, to join a CBR programme operated by the Ministry, in 1998, after which my other two colleagues continued to work as Portage Visitors from Department Three, supervising each other, with some occasional support from my counterpart, who periodically visited them as part of her new post.

In 1999 the Namibian Government was unable to sustain funding for the Engela Training Centre and all three departments closed. The buildings of the Engela Training Centre are now no longer in use.



## **Chapter IV**

### **Post Programme Reflections - A Second-Order Systemic Account**

#### **4.1. Introduction**

This chapter aims to provide a 'second-order' systemic analysis and account of my professional practice and experience within Namibia, building upon the postmodern ideas I introduced in Chapter II and the description of my work with the Engela Portage Programme within Chapter III.

Initially, I will introduce the reader to the systemic concepts of 'first-order' and 'second-order' practice and, in reference to the latter, also provide an overview of social constructionist theories. These are theories for understanding expert practice which I encountered subsequent to my experience within Namibia, as part of my research into that experience. I have found that they offer a rich source of new conceptual resources for thinking about Portage development and expert practice, which can particularly assist both an understanding of, and inform, expert practice within the complexities of a cross-cultural context found in developing countries. I also consider my transformations in understanding about my expert practice and Portage that I briefly described initially in Chapter III and I also attempt to frame these within a systemic account.

As part of the second-order analysis of my expert practice I consider some of the further background circumstances which I believe may have also significantly affected my professional understanding and practice within Namibia. I also specifically consider a series of issues which arose during my time within Namibia that I came to recognise as problematic for my practice. These are problems which are rarely considered in any depth within most first-order accounts of expert practice and Portage implementation, yet I believe they have important implications for such practice.

#### **4.2. Second-Order Systemic Theory And Social Constructionism**

##### **4.2.1. The Terms First-Order and Second-Order**

The terms first-order and second-order rise from the development of systems thinking initially associated with mathematics and particularly cybernetics (Capra, 1997).



Cybernetics is a theory of control, self-regulation and feedback loops, or systems, originally related to engineering and communication theory during the 1940s and 1950s and whose principles were believed to be equally relevant to machines, organisms and social structures. Cybernetics, as a systemic theory, was taken up and used to construct theoretical frameworks for a number of disciplines, including those related to neurology, biology and computer sciences. Later, Bateson (1972) was particularly influential in suggesting that cybernetics had relevance to understanding the complexities of human relationships such as within family systems and organisational systems. Cybernetic principles subsequently begun to inform the theories and practices of constructivism (von Glaserfeld, 1984, 1991) which has been applied to theories of education and learning (Steffe and Gale, 1995) and to the practices of systemic psychology and systemic psychotherapy. The term 'systemic' derived from the focus of these disciplines upon the relationships within and characteristics of systems.

Following from the original cybernetic model, von Foerster (1981) distinguished between various levels of cybernetics referring to a first-order cybernetics, in which the observer remains outside an account of that system which is observed, in contrast with a second-order cybernetics, where the observer is included within the 'observing system'. Consequently regarding a first-order systemic analysis, it is usually assumed that the expert has knowledge and skills which they wish colleagues to learn and understand. When applied to various professional fields and practices, this has led to experts who adopt a first-order systemic stance being understood as concerned with normative theory and to have a relative disinterest in meaning systems. Such first-order experts take an objective view of those onto whom they practice their professional skills. First-order experts intervene in the systems they observe and in doing so exercise their power and control to bring about unilateral change and 'improvements' in that system. First-order accounts therefore typically recognise change to the system but not change to the expert. Essentially, first-order expert practice equates to the 'ideal' expert implied by modernism I referred to in Chapter II.

In contrast, in a second-order systemic account the expert assumes that both they and their colleagues have much to learn together and it is this co-evolution and mutual change of understanding that presents further opportunities and opens avenues for change. In short, a second order perspective involves the expert taking a step back from



something, so that they can consider their own entwined relationship with the system as well as consider the system itself. In reference to my own experience, I see my second-order account as representing my reflecting upon my own expert involvement and systemic relationship with the Engela Portage Programme and my Namibian colleagues. In doing so, I am inevitably also reflexively 'thinking about my own thinking' regarding my actions and practice related to the Programme. Second-order systemic theory suggests that when we have the opportunity to understand something, we also have the opportunity to re-examine and re-order our previous understanding about what it is we are trying to understand. Therefore, a second-order stance entails a re-positioning of my expert self.

Consequently, as is the focus of this thesis, the analysis of one's own practice and researching one's own act of understanding becomes of prime concern. So, reflection and self-reflexivity, concepts which I introduced in Chapter II in relation to the practices of research, are also important processes associated with second-order systemic professional practice. The implication for expert practice is that instead of simply studying the instrumental and technical stages of change within a Portage programme's development, the materials developed, the documented aims and objectives, the problems solved, and so on, the focus shifts to include considering the recursive processes at work between the expert, their colleagues, the programme and the specific context. So, for experts to consider and to begin to recognise their own role in the totality of the observing system, this clearly requires the expert, the observer, to develop their reflexive abilities and thereby comment upon their own part in the emerging system through a reflexive analysis.

Through my further research into my own expert practice I have found that the theories and practices of systemic psychology and systemic psychotherapy in particular have offered both a framework in which to understand, and a language with which to describe, the shifts in understanding regarding my practice and the development of the Engela Portage Programme. I found these systemic ideas useful as they also highlight the enactive nature of relationships in both practice and research together with the need for reflexive questioning on the part of the professional practitioner and researcher, all of which are key themes that emerged from my practice within Namibia. I shall return to discuss these systemic practice ideas in greater detail in Chapter VI. Tracing the history



of these ideas within psychology and psychotherapy I have also noted that a schism began to emerge within the 1970s and 1980s regarding the literature related to systemic thinking. This change in part reflected both an embracing of the postmodern ideas that I described in Chapter II, and feminist and multicultural critiques of earlier second-order systemic practice and theory. I shall briefly include a description of this division as it is very relevant to the particular understanding of second-order systemic ideas by which I understand my own expert practice and its development.

Sarbin (1986) and Hoffman (1990) referred to this change in understanding systemic practice as a shift from the earlier image of cybernetic circles to that of an endlessly shifting narrative. Anderson and Goolishian (1988; 1990) also highlighted their concerns with the mechanistic metaphors which underpinned the earlier cybernetic paradigm of systemic thinking in its implications for understanding human relationships, which they felt focused too heavily upon images of people as information-processing machines, rather than meaning generating beings. Consequently, a post cybernetic systemic psychology and psychotherapy has emerged, which placed greater emphasis both upon understanding systems, such as organisations, the family, etc., as more open systems influenced by numerous other systems, together with the importance of language and meaning in social interactions. A second-order analysis is therefore further broadened systemically, if we consider that observing systems might be conceived as an observer community rather than a single person, such as the individual expert. This recognises that individuals construct their perceptions of the world not simply through their individual cognitive systems, as constructivism would imply, but through wider linguistic and cultural conversations by which they learn (Hoffman, 1988). This postmodern inclined change to systemic ideas frequently refers to social constructional theory.

#### 4.2.2. Social Constructionism

Social constructionism views the self as being the product of language and narratives, such that our understanding of ourselves emerges from various social constructions which change and adapt to the dynamics of differing social contexts. Essentially, a social constructive systemic perspective therefore views language as constitutive and places the expert as part of an exploratory conversational venture, in which they engage collaboratively with colleagues and others as their joint action unfolds and through



which learning, that is change, takes place through collaborative discourse. Social constructionism therefore adds another layer to earlier second-order systemic theories and ideas taking them beyond the boundaries of constructivism, which restrictively, according to a social constructionist perspective, understands narratives and their formation as predominantly personal. In contrast, this broader systemic understanding of practice calls for a more reflexive, socio-political awareness of relationships and interactions and for expert practice to begin to challenge some of the dominant discourses present within one's practice (White and Epston, 1990). It argues that experts, like everyone else, do not have an infinite number of ways of viewing events and of ways of working, but hold a narrow set of narratives, provided through their socialisation and cultural background.

It is important to stress that social constructionism is not a practice theory or model nor is it a readily codified school of thought and it has been viewed more as an approach or a stance (Anderson, 1992a). Indeed, it has also been described as a 'method' of postmodern discourse, a visionary approach to postmodernism by which postmodern ideas might be translated into forms of practice (Hoffman, 1990; Witkins, 1991). There appear to be several key ideas and assumptions that represent and unite the broad and varied notions of social constructionism which I shall describe below.

As social constructionism embraces postmodernism it also shares postmodernity's epistemological, ontological and methodological positioning. As I have referred to in Chapter II, one of these is the central belief in the impossibility of objectively knowing reality. Rather, social constructionism argues that our representations themselves 'construct' reality (Pearce and Foss, 1990) with our knowledge of the world constructed through social communication, such that reality is essentially whatever we agree upon with other people. As our social world is not given but created socially, with meaningful language being formed within processes of relationships, all that we propose as real or good (ontology and morality) are the products of human interchange. Consequently, this view claims that there can be no moral belief, or vision of society and life that can be striven for which does not have some basis in the relational process.

Social constructionism therefore places a significant emphasis on language and our usage of language provides the building blocks from which we create our own



experiences. Language and rhetorical devices are seen as having the power to enchant us into seeing in particular ways such that experts and non-experts alike typically project their socially constructed categories outside of themselves, and then treat these categories not as language fabrications but as if they were real. Social constructionism, also suggests that what is materially real can never be fully captured by words and that consequently language, in apparently focusing upon some aspects of the world, overlooks others. Therefore language as an integral part of the discourses through which we live our lives has the power to implicitly prescribe some beliefs while proscribing others.

Essentially, therefore social constructionism considers that meanings, together with the understandings and 'rationalities' by which we live, are developed through the process of social interaction and social consensus (Berger and Luckman, 1966; Gergen, 1985; Shotter, 1993a; Gergen, 1999). Gergen (1985) also suggested that social constructional research is concerned with social situations and the reflexive historical and cultural understanding of how world views emerge, using historical, cultural and contextual analysis to deconstruct the social processes which construct the world. It is through socialisation, that these socially constructed meanings become internalised. According to social constructionism, that which is 'real' to us is that which is co-constructed through language and interaction in the continual interplay with the surrounding socio-cultural environment. These understandings are negotiated through power relationships socially within the social context in which they are embedded, and within the ongoing conversation. Meanings are therefore never static or fixed but constantly shifting during the process of social interaction.

During our social interactions and our conversations, ideas and meanings are exchanged and so our beliefs and knowledge are constantly formed and re-formed. Any consistency of meaning will only depend upon our social interactions not altering that meaning. However, our knowledge of any particular topic, event or object may change and renew itself wholly or partially with each interchange we have with others (Hoffman, 1993). Anderson and Goolishian (1988) referred to this altering and sharing of meanings as 'intersubjective'.

As I referred to in Chapter II, just as social constructionism understands theories, ideas, concepts and memories as arising from social interchange and mediated through language, so the whole 'self' of the expert may also be socially constructed through dialogue and language. To recap, according to social constructionism it is through this on-going conversation with others that the individual intersubjectively develops a sense of identity and an inner voice. From a social constructionist perspective we are all essentially dialogical beings, evolving knowledge, meaning and the meaning of action through this perpetual conversation and other communicative interactions. Similarly, Gergen (1985, p. 267) suggested that constructionism claims that "the process of understanding is not automatically driven by forces of nature, but is the result of active, co-operative enterprise of persons in relationships" .

With the constructionist notion of ideas as transitory in our conversations, changing from moment to moment, constantly under construction, just as with the ability of language to capture accurately the material world as I described above, so it follows that no communication between individuals is ever complete or clear, with each idea being interpreted in a unique way. Berger and Luckman (1966) also claimed that the socially constructed meanings that we inherit as part of our own social worlds are opaque and the manner in which our meanings are constructed are invisible to us, as are the elements which compose it. As Shotter (1993a, p. 180) wrote:

"meanings are always first 'sensed' or 'felt' from within a conversation, that is, are embodied as vague, unformulated 'intralinguistic tendencies', and as such, are always amenable to yet further responsive (sensible) 'development' ".

The analogy sometimes used to describe this notion of shifting and change in ideas is that they are rather like exchanges of a ball of clay, with each person shaping the idea differently to their own liking, before passing it on to another, so that the shape of the clay changes to some degree with each exchange. These changes come as a result of our being in conversation with others and indeed also with ourselves, so that conversations may both expand or conversely limit our understanding. As Saleebey (1994, p. 357) suggested meanings "can inspire or oppress. If so, why not take the time to work with individuals to articulate those meanings, those stories, those possible narratives that....promote action".

When applied to expert practice, as they have been to the practice of psychotherapy, social constructional systemic ideas usually assume that the role of the expert is to help



people to construct different and more helpful narratives and understandings about their 'problem'. By this means they are encouraged to generate different or unique ways to move forward. However, as I have described in Chapter III regarding the shifts to my understanding, I also came to recognise that it was not only my colleagues knowledge and understanding that I needed to change, but that I too had to engage with my colleagues, so that together we could construct and generate new knowledge, meanings and forms of practice. This acknowledgement of the co-constructing of understanding and meaning during practice is recognised by those who advocate systemic practice ideals as a fundamental characteristic of the expert-client exchange (Cecchin et al., 1994) and which highlights the vital importance of interpersonal processes. Clearly, an important implication of this social constructional systemic understanding of expert action is that the expert's own beliefs, values and worldviews become highly significant. Therefore, as I also came to understand myself during my work within Namibia, a first step in developing my expert practice was to initially begin by reflexively questioning the foundations and nature of my own beliefs and rationality.

#### **4.3. A Systemic Account For My Shifts In Understanding**

In Chapter III, I described some of the shifts in understanding that I began to experience particularly following the launch of the Engela Portage Programme, which I believe occurred through working with local families and as my relationship with my departmental colleagues improved. By reflecting on how I might improve the Engela Portage Programme I recognised that I had to inevitably also consider how I could improve my own practice. As Winter (1998a) also claimed, action research into our own committed practice inevitably becomes a self-reflexive, self-questioning process. I believe that it was in the novel and unique situational circumstances of the cross-cultural context that my questioning led to reflexively acknowledging the limitations of my own implicit theories to cater for the challenges I faced. Moreover, the situational factors importantly included the challenges and possibilities presented by my relationship and conversations with my colleagues and other local people. Working alongside my colleagues daily we started to foster a greater degree of openness and trust in our relationships, so that I began to learn from them and their sometimes very different ways of viewing the world, just as no doubt they began to learn from my sharing of my worldviews. In these circumstances it is easy to see how a reflexive sensibility can

emerge and so an inner journey begun. As I have also explained, as part of that journey I started to question some of these earlier foundational beliefs that I held, along with other personal dispositional aspects such as my intentions and aspirations, and to also try to consciously develop what I believed to be a more reflexive style of working with local colleagues. I also begun to arrive at a fuller appreciation of the significance of enactivist knowledge, where knowledge is acquired by:

“a process of opening ourselves to others, at the same time opening the possibility of affecting our understanding of the world ...[so that]..there arises a possibility for action/understandings to emerge that likely could not have been achieved by either participant independently” (Davis and Sumara, 1997, p. 111, insertion added).

This experience helped me to appreciate how the dispositional and situational factors (Usher, et al., 1997) of my practice-research were intimately related, with each shifting responsively to the other. I think that this context was also one in which there existed an ‘isomorphic’ relationship or parallel process (Liddle, 1988; White and Russell, 1997) of reciprocally influencing domains of conceptualisation and action. It was my appreciation of this isomorphism and my reflection on my role which began to provide me with my own theory for constructive expert practice. Thinking about these shifts, retrospectively, I can also appreciate how they were probably further associated with and mirrored by my willingness to reconstruct conceptually the prime focus of the Engela Portage Programme. That is, the recognition of the complications of my position drew attention to how, as a professional practitioner, my self-understanding was inextricably and enactively interwoven with the manner in which the Programme and my relationships with my colleagues developed. In turn I believe that this also helped me to begin to comprehend the complexities of how my knowledge and understanding had to be systemically mediated.

Once I began to value this perspective, the appearance of ‘problems’ became signals for me to reconsider and to reflect how I might again be setting inappropriate expectations and missing valuable opportunities to learn that which I had not previously been open to or could not value or conceive as an alternative possibility. ‘Problems’ became re-constructed as possible manifestations of my own myopia and of the inappropriateness of some of my presumptions and Western-biased expectations, and they also acted as



markers to signal when more conscious and deliberate attempts to forge further collaborative understanding was necessary.

As I have described in Chapter III, this was not a sudden transformation, nor did the course of my new learning and understanding always run smooth. Even when I came to recognise and appreciate the importance of the shift in my understanding, this remained a process characterised by my alternating between various positions. At times I found myself grabbing, first-order fashion, at particular ideas and assuming control and then, when conscious of this move, trying to regain a more collaborative and second-order stance. Reflecting upon these changes to my understanding while in Namibia, I also began to appreciate that it was not just a matter of reflectively reconsidering my role and then formulating different practices from this new appreciation, which were then put into action. Rather, the relationship between understanding my role and my practice represented an intimate synthesis of both. It was as if the reconceptualisation of my role was itself to engage in a qualitatively different form of practice. I had begun to appreciate how the act of thinking differently about my role was the act of practising differently. These are the enactive, recursive and isomorphic qualities, which seemed to account for how many of the changes occurred. Indeed, my understanding and learning, as this thesis will attest to, continued to evolve following my departure from the Engela Portage Programme, during my research into that experience and as I wrote this thesis and reflected again upon my experience and subsequent learning.

However, I have been puzzled to explain why I had not previously come to understand my expert practice in this manner in my professional practice within the United Kingdom. Why had the challenges to my practice in that context not evoked similar shifts in understanding? What was different about the Namibian context that led to these transformations? Drawing upon systemic ideas I have constructed the following possible explanation.

As I have described, the transformative realisation regarding my expert practice and the Engela Portage Programme occurred alongside the developing relationships with my colleagues, as we began to focus upon the problems we encountered both in terms of the difficulties in implementing the Programme and significantly the difficulties I experienced in aspects of our working relationship. I will give a fuller account of these

problems below. Through this process I began to grasp that my colleagues' understandings of many concepts that I had taken for granted as practically universal, such as regarding childhood, views of parenting, notions of disability, and so forth, were sometimes markedly different from my own. I began to wonder how and why these differences might have arisen, and what the world might be like viewed differently. Of course prior to arriving in Namibia I had realised that there were different worldviews held by different peoples. However, it is one thing to intellectually know this to be the case and another to personally confront such worldviews in one's expert practice and to suddenly and experientially realise, that many societies globally, perhaps the majority, hold views some of which are very different from those held within the West. Moreover, coming to appreciate that these are clearly credible alternative worldviews is evident in that, for example, other societies have and continue to be successfully organised around these different views and meanings. While this recognition that there were alternative and very different worldviews from my own represented the first step in my reflexive initiation, it was closely followed by a further appreciation that they, my colleagues, too found some of my basic beliefs to be equally inexplicable. From this challenging and initially unsettling realisation, it took little effort for me to then view my own beliefs from a more detached perspective, to render them strange, and to begin to understand the partial, contingent constructions of my own worldviews as equally curious.

Perhaps above all, beginning to understand self-reflexivity requires a radical questioning of what 'self' entails, a questioning of implicit worldviews. As I have described, social constructionism conceives the mind as not sited in the brain but to lie in the linguistic interactions and the "network of conversations" (Maturana, 1988 p. 68) among human actors. Consciousness, the mind and the self are therefore understood to be fundamentally social, rather than neurological. Maturana claimed that these networks of conversations are "consensual co-ordinations of actions and emotions that constitute them" (p. 70) and they represent human social systems. According to this view, the normal interactions of a member of a social system are from within the network of conversations that form it. Consequently, Maturana argued that these interactions are ordinarily confirmatory of the system and conservative. However, Maturana (1988, p. 70) also suggested that change in a network of conversations might occur in two ways:



“a) through the encounter with other human beings in a network of conversations that do not confirm it, or through the experience of situations that do not belong to it; and b) through interactions that trigger in us reflections upon circumstances of coexistence with other human beings. The first case usually happens when we encounter actual foreigners..... The second case usually happens when we... distinguish our circumstances and consider them in reference to our desires of coexistence with other human beings”.

With regard to my presence within Namibia, both of Maturana's conditions for change were present to fairly extreme degrees. I found myself within a community of 'foreigners' and for both personal and social reasons, I had much invested in wishing to relate, or as Maturana described 'to coexist', with my colleagues and others from within that community. Maturana also described interactions with others which were not confirmatory of a system as 'orthogonal interactions' (Maturana, 1988), that is perpendicular to that which ordinarily happens. He claimed that it takes a significant orthogonal interaction, such as being suddenly relocated to a different cultural environment, to bring about change. Of course, experts frequently are in positions where they too can bring about patterns of orthogonal interactions with those with whom they work, and at the same time by necessity must themselves be open to orthogonal interactive experiences. Accepting Maturana's theory would appear to provide a helpful narrative to explain why I experienced some profound shifts in my own understanding within Namibia and also why these had not occurred to the same dramatic degree previously within my professional practice in the United Kingdom.

As the development of the Engela Portage Programme progressed, surrounded by colleagues and families who culturally offered me access to some very different networks of conversations, I necessarily began to reflect and to become much more self-reflexive. No doubt my colleagues and others with whom we worked similarly experienced changes in their understanding. These enactive possibilities for joint-action within Namibia therefore also offered the possibility of a “commingling of consciousness” (Davis and Sumara, 1997, p. 110).

Although the value of reflexivity is that it enables the practitioner-researcher to begin to question the parochialism of their own preconceptions, as I can also personally testify, it is not such a straightforward task to first identify and then to scrutinise that which may to us prove natural and thereby beyond question. Again this may have also accounted for

my lack of reflexivity in my practice within the United Kingdom prior to my experience with the Engela Portage Programme.

Along these lines Abercrombie (1953, quoted in McLaughlin and Ponte, 1997, p. 103) suggested that:

“For the educationist a significant thing about assumptive worlds is that they are built up largely in an unconscious, non-rational, non-intellectual way. Most of us, most of the time, are no more conscious of most of our assumptions that we are of the movement of the earth - we are one with them, as with it”.

Therefore, what we as experts understand in a new context will largely relate to our prior understanding and knowledge, and it is only through trying to understand, through dialogue, that which does not initially tally with our assumptive worlds that we feed back to and change our assumptions in a hermeneutic cycle.

Perhaps also part of the difficulty in experts recognising the persuasiveness of their assumptive worlds is that, as Westerners, while we may accept the role of our own culture and society in influencing some of our belief systems, we still tend to see these processes as ultimately and essentially being open to change by our own internal subjective self and our individual processes of rational thought. Within the West, we also popularly appear to believe that we can somehow subject these processes to critical examination and accept or reject them on a rational basis for becoming assimilated or not into our personal value system. Within general understanding we continue to have our conception of self, the point at which we believe such internal deliberations to occur, dominated by an image of an individual and isolated self, which is not substantially seen as part of an ever present relational matrix. Gergen, (1999) claimed that it is as if as experts we imagine an ‘originary self’ which sits somehow in judgement, guided by our mental processes, enabling rational decisions to be arrived at and our subsequent actions to be controlled. Consequently, although below I will be referring to the conceptual background and ‘my’ initial preconceptions, which I believed played a significant part in shaping my professional role and ideas, I am mindful of how these beliefs were essentially not solely part of my own internalised individual mentality, but were the product of the rich social relational web into which I had been socialised and educated.



#### **4.4. A Reflexive Account Of My Expert Involvement- Applying A Systemic Analysis**

##### **4.4.1. Background: Reflecting On The Conceptual Context**

As I have described, a second-order perspective and social construction theory views our 'selves' as embedded in networks of conversations or discourses which are constructive of our thoughts and practices and which constitute our present being. Foucault referred to these languages and practices that we take for granted as the 'micro-fascism of everyday life' (Rabinow, 1984). Consequently, as experts, particularly when working in cross-cultural contexts, I believe we have a responsibility in the interest of good practice, to be aware and to remain conscious of our prejudices. As expert engagement involves a constant exchange between expert and colleagues and others, it is likely that it is our prejudices that are often exchanged. In the section which follows, I will therefore attempt to identify what I believe were the key themes and understandings from my own cultural networks of conversations, those prejudices and ways of making sense of the world, in which I was embedded prior to arriving within Namibia. In doing so, I hope to particularly describe those beliefs and values which framed my understanding and expectations about what my role might entail, and which effected the direction my practice took and spurred my earliest professional endeavours while at the Engela Training Centre.

From a social constructional standpoint, there are of course difficulties in attempting to pin-point, in terms of time and space, any originary point of action which might have determined my subsequent professional intervention. Each attempt to do so would reveal the complex precursors that were equally implicated in structuring and determining my future action. Inevitably we are unable to fully escape our assumptive worlds in some form or other. There is no gods-eye, transcendent position from which we can view our progress. However, although I acknowledge the artificiality in doing so, I believe that it is beneficial for me to try to begin by self-reflexively crystallising some of 'my' early conceptualisations, for the purpose of illustration, such as those notions about Africa and Namibia, and those related to professional-practice issues, which I believe most significantly affected my expert practice.

#### 4.4.2. Prejudices of Africa and Namibia

##### *“Gran’s off on an adventure.*

A Hampshire grandmother is swapping the twentieth century luxuries of her Howard’s Way home for one of the most primitive corners of the world....she has embarked upon a once in a lifetime mission to deepest Africa.....her African assignment will take her to a land where the desert terrain goes on forever and for many of its inhabitants time has simply stood still....[she] is chalking up the last years of her teaching career by taking a front-line educational role in Namibia - home to some of the most primitive tribes in the world....she is excited by taking a job in one of the most challenging corners of the world... “it has certainly given me more street credibility with my grandchildren,”.....she has completed packing her bags for the gruelling 14-hour flight to the remote republic in the south west corner of Africa. The extent of the task is a daunting one in a country where a staggering 70 percent of the children with special needs are not even receiving any education. It is really a journey into the unknown. [she] did not know about her future living quarters but said: “It will be good accommodation. I will not be living in a mud hut!”.” (The Daily Echo (Southampton) Tuesday July 7<sup>th</sup> 1998).

The newspaper article spurred me to reflect upon some of the major preconceptions that I too held, before my arrival and during my first few weeks and months within Namibia, regarding my expectations related to the country and the people. I do not believe that my early views were particularly unique for a ‘Westerner’, as I soon gathered from conversations with many of the other volunteers recruited by VSO and also from listening to the views of other Westerners who were planning to work in Africa for the first time. Indeed I continue to hear them expressed, either implicitly or explicitly, in the comments of friends and professional colleagues currently within the United Kingdom, who have not had the opportunity or experience of working in Africa for any length of time.

The article illustrates the pervasive tendency, found in the general media and even professional writing about ‘developing countries’, to adopt an overriding rhetorical form or trope which frames and prefigures the ‘Third World’ as caught in some sort of temporally distinct, but nevertheless locatable knowledge-space, usually earlier and relatively more primitive, compared to the assumed superior standard and progression of Western history. As a textual device (Clifford and Marcus, 1986; Richardson, 1990a), tropes capture the prevailing preconceptions and frames of understanding current in a network of conversations. While it is perhaps inevitable that all forms of writing depend on a variety of literary and rhetorical devices to convey ideas and to make their points



convincingly and credible, I nevertheless believe that as professionals working in 'developing countries', we need to be vigilant to this tendency and the manner in which it may influence our understanding and that of others.

This awareness may at least begin to help professionals to acknowledge the consequences of this prefiguring rhetoric and thereby caution us to realise that, if we believe that 'we know something', then tropes are likely to be functioning at some level. Such tropes can potentially influence our perspective, analysis and creativity in our practice by leading us to an understanding which prefigures 'the problem' in certain and possibly narrow terms and thereby may not encourage a wider questioning and critical appraisal of our taken for granted assumptions.

The newspaper article also illustrates examples of further underlying Euro-centric notions, which I know were part of my own presumptions, such as those of assumed procedural, technological, and moral authority which are typically associated with efforts at redemptive expert intervention. The tone of the article seems to imply that a 'weaker' Namibia is somehow in need of salvation, through a generous self-sacrificing rescue operation. Such an allegory of saviour and salvage appears to be deeply ingrained in much international development writing, including international Portage research, and the inherent conceptions that many of us within the West continue to hold about 'others'. Unfortunately the very categories of understanding, such as 'underdevelopment', 'developing', 'poorer countries' and 'Third-World', which motivate many experts towards offering their professional services overseas, can also become the means by which we index and construct otherwise ambiguous events and experiences and may cause us to stop being curious.

I recognise that some of my earlier concepts of Africa and Namibia were also coloured by notions that I had something to offer professionally and that, by 'sharing' my professional skills with local colleagues, I would be 'helping' to provide 'improvements' to a situation which was 'under-developed'. Inevitably, this influenced how I initially approached the Engela Training Centre, Department Three and my colleagues, and in many ways 'set the scene' for the pace and direction of my early involvement. Therefore an important first step for experts towards achieving any effective involvement and change might be to recognise, both in reading and their subsequent writing, that such

devices as tropes are operating and so begin to liberate oneself from them, not by avoiding tropes, which is not possible, but by appropriating and inventing new ones, as part of an alternative perspective.

#### **4.4.3. Professional Background and Prejudices**

##### **Governed Practice**

Although my preconceptions about Africa and Namibia clearly framed my overall early understanding about my expert role, it was undoubtedly my specific professional conceptualisations which set the terms for my initial involvement in the development of Department Three and the Engela Portage Programme.

My academic and psychological training during the early 1980s, and later professional teaching and educational psychology training during the late 1980s and early 1990s, fell very much within the mainstream theoretical and conceptual views prominent at that time. If, from a postmodern perspective, the content of my own teacher training might have been criticised for its essential scientism and “prescriptiveness and homogeneity” (Smith, 1995, p. 1), then my early psychological training would have fared even less well. Gergen’s (1978a) earlier lamenting regarding contemporary psychology, about the discipline steadfastly committing itself to the traditional positivist-empiricist paradigm, remained pertinent to my own educational experiences. Although my training as an undergraduate psychologist began to witness the foreshadowing of cognitivism as a movement away from pure ‘black-box’ behaviourism and to that which recognised the importance of the mind, it remained uncompromisingly modernist.

Indeed, epistemologically little had changed in educational psychology during my postgraduate training, later in the 1980s, and early professional practice. Gergen (1989, p. 472) continued to criticise the fact that, even with psychology’s adoption of cognitive theories, such a narrow preoccupation with cognitivism “blinds the discipline to the far more pervasive revolution occurring elsewhere in the intellectual world, that of social epistemology”. My own professional understanding was firmly embedded within networks of conversations which privileged the cognitive information-processing model. As such, the educational psychology of the 1990s, in which I was immersed prior to my arrival within Namibia, largely overlooked the postmodern turn and maintained a rigid parochialism (Van Langenhove, 1995).



In particular, educational psychology practice, certainly during the late 1980s and early 1990 seemed to be preoccupied with constructing 'packages' which offered 'off-the-shelf' means towards solutions for school, teachers and parents to a whole range of learning and behavioural problems. For example, packages prevalent at that time included Assertive Discipline (Canter and Canter, 1976), Early Learning Skills Analysis (ELSA) (Ainscow and Tweddle, 1984), Datapac (Akerman, et al., 1983) and Preventive Approaches to Disruption (PAD) (Chrisholm, 1986). In many respects, the Portage Early Education Programme can also be described as a similarly packaged programme. Most of these packages were essentially behaviourist in tone typically advocating the use of 'objective' teaching targets together with clearly structured, stepped processes of implementation which followed a detailed task analysis of the skills and sub-skills that teachers and children needed to follow (Hastings and Schwieso, 1987).

Particularly relevant to my own professional understanding at that time were the behavioural approaches which were known as the Problem Centred Approach (Cameron and Stratford, 1987) and the 'Four Ps' (Westmacott and Cameron, 1981; Faupel, 1982), the latter which I have described in Chapter III. Both of these represented core professional approaches in which educational psychology trainees were schooled at Southampton University, which I attended as a post-graduate. Consequently, both approaches also became highly influential to my early professional practice as an educational psychologist employed within United Kingdom LEAs and also inevitably during my early days within Namibia.

Despite reference within both these approaches to the importance of the 'process', the rigid series of steps through which they are implemented and the pursuit of clear objective statements with which to describe the target problem and desired outcome, continues to illustrate some underlying behavioural and positivistic preoccupation with measurable outcomes. This preoccupation with rigorous problem-solving action betrays the core 'technical rationality' (Schön, 1991) of the Problem-Centred Approach and the Four Ps. From a social constructional analysis, the difficulty with such apparently logical and rational approaches is that they both inevitably privilege conversations focused upon problems, discovering their causes and planning remedial action. As a consequence, discourse is effectively built around deficit notions either of individuals,

groups or organisations. Also, the inherent suggestion seems to be that analysing problems is a necessary prerequisite for solving or dissolving them. Again, the focus on problems and deficits not only creates a strong tendency to overlook signs of existing or potential competence, such as among those supposedly ‘affected’, but it can also prevent experts from seeing how important the resources of mutual-aid and enactive learning might be.

### *Special Educational Needs, Integration And Related Issues*

Deconstructing my professional background further, it is appropriate to question how specific professional values also patterned aspects of my practice within Namibia. Postmodern analyses suggest that the educational and practice philosophies of professionals are essentially underpinned by their own values and beliefs. The beliefs that professionals disseminate, and the professional language used, similarly imply certain values which act as a template for their perceptions of the world and play a leading role in inspiring the educational and professional philosophies they attempt to implement and share with colleagues.

Specifically, my professional values and beliefs were forged in the post-Warnock context of the 1980s. The Warnock report (Department of Education and Science, 1978), the subsequent Education Act 1981, and later legislation resulted in significant changes within the United Kingdom in how ‘special educational needs’ were conceptualised. As a consequence, there were shifts in the theory and practice of educational psychologists and other educational professionals. In short, the language of categories of handicap and segregated schooling was replaced by the concepts of individual special needs and individually tailored special provision, and a sharing of professional authority with a wider group of professionals and importantly a greater role for parents (Dessent, 1987). As a result, the concepts of integration and parental involvement represented the foundation for much of my thinking about special educational issues during my training and early practice. These values and beliefs gradually came to represent the orthodox views in most of the prevailing network of conversations and the predominating ‘regime of truth’ within educational psychology practice. Indeed, these beliefs themselves might be said to have been shaped within a Judaeo-Christian European culture which ostensibly privileged taken-for-granted values such as pluralism, collaboration, empowerment, participatory democracy and equity.



## **4.5. Reflecting On The Problems Of A First-Order Account Of Practice And The Beginning Of Systemic Practice Sensibilities**

### **4.5.1. Gathering Information**

As I described in the ‘Preparation phase’ of the first-order account in Chapter III, one of my early concerns when I initially arrived in Namibia was to set about gathering information about the role I was to play and the expectations that others had of me. This information gathering or assessment stage is typical of problem-solving approaches, with the implicit assumption that the gathering of detailed information about the ‘problem’, its causes, antecedence, and frequency will lead to ideas about planning interventions, identifying deficits and weaknesses and, in short, solutions. It assumes that truth is knowable and that development and change towards the ideal solution, is readily ascertainable. This stage also concurs with that of conventional action research models which employ, as Kurt Lewin termed, the ‘reconnaissance’ stage, when basic facts are collected about the context in which practice or research is to take place.

As the first-order narrative of my involvement with the Engela Portage Programme indicates, from the wealth of information and interpretations and courses of action that could be considered as vying for legitimacy, I clearly chose to eventually privilege and invest the Department’s energies into a particular course of action. Gergen and Gergen (1983) also referred to how individuals establish connections among experiences, and seek out events and facts which are consistent with their own socially constructed meaning systems. As individuals, we use this selective noticing of experiences to gather information that accords with our socially constructed realities, while selectively ignoring disconfirmatory information if possible. Reflectively, I can conceive that, in my haste to ‘get on with the job’, I perhaps too readily focused my attention selectively, employing my culturally laden initiative to direct my practice. In so doing, I fell very much in line with Lather’s (1990, p. 66) view of the researcher when she claimed that:

“Facts are not given but constructed by the questions we ask of events. All researchers construct their objects of inquiry out of the materials their culture provides, and values play a central role in this linguistically, ideologically and historically embedded project that we call science”.

On reflection, I believe that the terms assessment or 'reconnaissance' may be misleading, as it too readily conveys a simplistic investigatory view. This view portrays facts as somehow 'out there' waiting to be discovered, independent of those who seek them. In contrast, a social constructionist perspective acknowledges both the essentially fabricated nature of 'facts', as well as the intricate complexities of the social network to which experts and social researchers are to join and in which reconnaissance is to take place.

As I can attest from my initial discussions with a wider range of colleagues, in an effort to genuinely canvass local opinion, the problem for the expert is compounded, in that the nature of the information that they seek is largely social and that social information rarely falls into any neat consensual, uncontested package of facts about a programme's potential aims, expectations or needs. Additionally, not only is the expatriate expert likely to construe the 'facts' through their own pre-conceptions, but it is likely that their views will differ to various degrees from that of their local colleagues and others with whom they are hoping to work. Although this difficulty might lessen as both expert and colleagues moved towards an improved mutual understanding, this process inevitably takes time and time is exactly what I felt was absent during my early 'preparation' stage, when I perceived expectations for action and change as high.

For this early stage of expert involvement to be meaningful, it would seem to require that both some form of very early collaborative practice relationship be achieved between the expert and local colleagues, and also that the expert is prepared to begin to reflect critically upon their part in the subsequent unfolding of events. Indeed, Maturana (1988) suggested that the very organisation of systems, such as the local context I entered after arriving at the Engela Training Centre, is essentially a pattern of recurrent conversations. To participate in these conversations and to become an active part of the local context, the expert needs to be able to contribute through listening and adding their voice and so construct patterns of conversations mutually and co-operatively with colleagues. This early information gathering stage, from a systemic perspective, might therefore begin with listening to the conversations that abound in the system in which change may take place rather than seeking to discover facts. This shifts the expert task beyond a simplistic notion of assessment in which they gather evidence and formulate a diagnosis of 'the problem'. The aim becomes not to uncover a correspondent 'truth' that reflects objective reality and beliefs in a transcendental knowledge, but rather to forge a coherent



truth, coherent in that it ‘fits’ with the conversations of colleagues. This coherent truth is a socially constructed truth and is not concerned with underlying causes or reasons, but rather is concerned with maintaining ongoing generative conversations. I shall return to discuss how I believe expert practice might be orientated to achieve this in Chapter VI

From the outset when working in Namibia, I was also aware that I was starting from a point where there was no absence of views about what was needed and what I should be doing. There were many and various interpretations, from different sources and between individuals, which I had to consider and to include along with my own observations and interpretations. Collecting information about the task ahead clearly is therefore never a neutral process as the research literature might imply, but one in which there is potentially plenty of scope for power play and argument.

Overall, my experiences of the information gathering process led me to begin to appreciate that this early process was crucially a collaborative learning phase, in which the professional needs to be able to reconcile conflicting views and to become aware of the local political, social and associated issues. On reflection, I can also appreciate that, had I been more vigilant and less pre-determined, I might have been even more open to alternative and fresh perspectives. However, as I shall describe below, there were many barriers to achieving this collaborative ideal by which unique and less familiar perspectives might have emerged.

#### **4.5.2. Language And Communication Problems**

Meaningful human interaction depends critically upon language, effective communication and developing shared understandings. Language is the fundamental tool through which experts work, no less so when their practice takes place in ‘developing countries’. Yet I find it odd that, while the restrictions caused by language difficulties sometimes presented significant problems throughout my time at the Engela Training Centre and shaped the working relationships that I was able to develop with others, little reference is made to these problems in the bulk of the literature describing the development of Portage or similar programmes. At a practical level, I would have imagined that language difficulties are likely to present significant obstacles certainly for the expatriate expert, acting both as an immediate barrier to them acquiring a fully

shared understanding of local issues, and also representing a potential source of cross-cultural misunderstanding.

Within the Engela Training Centre only a few of my colleagues spoke English relatively fluently at a conversational level and, as I spoke no Oshivambo in the early days, this clearly limited my ability to directly canvass the opinions of most colleagues. Consequently the route through which much of the information that I gained was restricted to those few who spoke English. Indeed, the problem was more acute than this might at first suggest. Even communicating with my English-speaking colleagues was far from straightforward. I found that there was a lack of familiarity with my form of English language usage, which was very different from that which most of my English speaking colleagues used and which I soon found led to regular misunderstandings.

Talking is both formative and provides information to others. It not only allows the listener to learn what the speaker is thinking, but also helps the speaker gain insight into their own thoughts as they search for the right words to use. Words often have personal meanings for us all and we use them metaphorically to carry meta-meanings to the first-order sense of our words. Indeed, it is very difficult not to communicate using our familiar metaphors. However, it was through my experience of the restricting problems of language that I gained some insight into how my own language usage regularly employed a wide range of metaphors and rhetorical devices and language conventions stemming from my English language culture. I also began to appreciate how much I depended upon others sharing and understanding these conventions, in order for communication to be fluent and fully intelligible. Unfortunately, these conventions and language forms, which I took for granted, were often not shared by my Namibian colleagues, most of whom had learned their English in rather different language cultures. Turns of phrase, analogies and metaphors, unconscious rules such as relating to turn-taking and expected replies, all had to be re-considered and a new shared understanding constructed over time with my colleagues.

Regarding my ability to communicate with the majority of non-English speaking colleagues at the Engela Training Centre, although there was always the possibility of assistance from those colleagues that spoke English acting as interpreters, this process is clearly not without its complications and problems. However, I inevitably had to rely



upon my counterpart and others translating and interpreting both for myself, and my non-English speaking colleagues, and with the families of students. These difficulties persisted throughout my stay in Namibia, although we did eventually grow more accustomed to our different manners of communicating and some shared understanding of meanings emerged.

The communication problem was further exasperated by non-verbal communication difficulties and differences. Fry and Thurber (1989), when considering the problems faced by expatriate experts, also referred to problems aside from those related to ignorance of the local language, citing research which claimed that only 30 percent of what is communicated through conversation is verbal. They also noted that “non-verbal communication patterns vary significantly from one cultural setting to another” (p. 49) and included difficulties with paralanguage related to the volume, rate and tone of language differences between cultures; touching behaviours; interpersonal distance; and the reluctance of certain cultures to say ‘no’ directly. Certainly I found some of these differences apparent in my relationship with my colleagues. For example, I found it remarkable, compared to my own cultural experiences, to note that colleagues very rarely challenged someone’s opinion directly if they disagreed and it was exceptional to witness a conversation or disagreement become even moderately heated. If colleagues disagreed with each other or with me, they usually employed very subtle means to convey their disagreement or would alternatively apparently acquiesce, but subsequently not follow through with the agreed action. Initially this occasionally led to a considerable degree of confusion and misunderstanding between us, which no doubt also affected the nature of my working relationships with my colleagues and the manner in which our joint practice evolved. Again, some of these very important communication differences only became apparent after working closely alongside colleagues over time, and time was also needed for both myself and my colleagues, who probably were similarly confused by my forms of communication, to arrive at a more satisfactory understanding of each other’s cultural idiosyncrasies. It is difficult to imagine how I may have come to appreciate and learn these important communication differences, if I had been employed on a short-term contract or had only intermittent involvement with my colleagues over time.

### **4.5.3. Using Interview Discussions And Informal Conversations**

As I described in my first-order account of the Engela Portage Programme in Chapter III, the use of interviews and informal conversations provided me with the most significant and usual sources of information and learning opportunities while working at the Engela Training Centre. What might be called formal interviews typically took place during my early days within the Centre when I was introduced to other colleagues and when I was unfamiliar with the local context. Usually these interviews consisted of my approaching either individual colleagues, or more usually groups of colleagues, during times which were deliberately set aside for us to discuss questions that I had about the Centre and Department Three as well as many other issues. These meetings were also opportunities for my colleagues to ask any questions of me, although initially this was not usually the case.

Informal interviews and conversations, on the other hand, were those countless occasions when either through chance or at very short notice I was able to discuss particular questions with colleagues. I found that these informal interviews and conversations were invaluable and they proved to be the prime source of a wealth of information about most issues that I was concerned with. As my involvement with the Engela Training Centre was primarily as a practitioner, keen to share my skills through working alongside local colleagues, rather than as a researcher, interested in collecting data, most of these interviews and conversations were primarily directed towards practice improvement and the development of collaborative and effective relationships with my colleagues. Hence there was no place for the use of questionnaires or tightly scripted interview questions, as might have been associated with a formal research project.

On reflection, perhaps these informal conversations proved to be the most valuable and generative aspect of my communications with colleagues precisely because, unlike formal interviews, they usually did not consist of a predetermined topic. Rather the topics often arose during the course of the conversation itself. In many respects, this process mirrors the manner in which a social constructional perspective suggests understanding usually occurs, that is unpredictably and serendipitously (Shotter, 1993a).

As I developed a closer working relationships with colleagues, and as I became a more fully accepted member of staff at the Engela Training Centre, I found that the nature of



our conversations during these informal interviews also began to change. The sessions became less stilted and the information flow more reciprocal, with my colleagues beginning to both ask more inquiring questions about personal and professional issues and to provide much broader information to me about the fabric of life locally. Clearly, as I discovered, these conversations can also represent a very important means of developing a more collaborative context and shared practice with colleagues rather than simply representing means to gather information.

Within the general international development literature, the use of interviews has long been advocated as particularly applicable for use in 'developing countries'. For example, Havelock and Huberman (1977, p. 12) suggested that interviews provided, "the richest and possibly the most significant information", a view echoed by Rondinelli et al. (1990, pp. 49-50 ) who claimed that the use of interviews in developing countries:

"allowed analysts to collect data on a wide range of subjects. They are usually a rich data source through which analysts can build rapport with those being interviewed and explore the nuances and subtleties of the situation".

However, while acknowledging the importance of interviews, as I also came to learn, whether formal or informal, they can also be very problematic for experts, beyond the usually understood methodological limitations referred to in practice and research texts. Through reflection on my interviews and discussions with colleagues, I became aware that interviews, perhaps unavoidably, can also represent opportunities for power to be exercised. Yet it is notable in the literature on expert involvement that, while the productive aspects of interviews in research and practice are usually stressed, the restraining and oppressive aspects are often overlooked. Collecting information through interviews and conversations are also likely to represent occasions when the practitioner-researcher, together with those being interviewed, can use the situation as a means to possibly create previously unformulated truths about views, or they can privilege only particular responses, while also subjugating other meanings and views. When I reconsider some of the questions that I posed to colleagues at the Engela Training Centre, in many cases it was with the aim to gain some new insight and information, although, as I have described above, given my preconceptions about the technical aspects of practice and change, I am aware that I already had some established response preferences in mind. Equally, my colleagues would have often been aware of what I

hoped or expected and what lay behind some of my questions, from the earlier conversations and interviews that we had. Also, no doubt they inevitably would have had their own personal and professional agendas, which would have influenced the responses they were prepared to offer, as well as the information they may have held back.

Again, it is possible to understand how, from an enactive and systemic analysis of expert practice, there is no innocence in the process of information collecting or in the language used to convey 'facts' and later to retell them. As the systemic literature implies, the construction of meaning is intimately tied to the complex issues of power and the reflective and reflexive expert may do well to recall that power should be assumed to pervade all of our efforts to learn and to know about a particular subject. As such claims to value-free knowledge merely obscure the human interests inherent in all knowledge. Reflecting on my interviews and conversations with colleagues at the Engela Training Centre, I am also aware that, as a white European professional male, in relation to certain topics, such as programme development and special educational needs, my colleagues held me in something of an authoritative, expert position. As such, this surely influenced the dynamics of our conversations and the intentions and meanings I imposed upon the information that I 'gathered', which subsequently I used to make decisions about change within the Department.

Systemically, it is possible to conceive that there are additional problems for experts who rely on interviews to gather information. Whatever practice or research approaches chosen by the expert, these will have considerable affect and will pattern the nature of the 'findings', despite, or even possibly due to, any emancipatory inclinations of the expert. Zavarzadeh and Morton (1987, p. 16) have also deconstructed and questioned the use of interviews as a method of apparent innocent inquiry:

"As a mode of knowing, the interview technique is an exemplary strategy of traditional humanism since such a device inscribes fundamental humanist values (that is, liberal pluralism, unmediated knowledge, participatory democracy, consensus among free subjects)....The focus of the interview (unitary, sovereign subjects) reaffirmed the belief that people contain knowledge (they are self-present subjects) and that all one has to do to have access to that knowledge is to engage in "free" and "unconstrained" discussion....the technique is, of course, an exemplary instance of what Derrida has called the desire for presence".



Therefore paradoxically, although as I had assumed interviews and discussions generally could be portrayed as means by which to foster collaboration and the negotiation of meaning, on reflection this may not necessarily be the case. As professionals working in developing countries, amongst colleagues with less formal education and where gender and racial deference may be significant, we risk employing, perhaps unconsciously, various linguistic and rhetorical means to 'steer' the course of the interview. As I have referred to above regarding information collecting generally and the temptation of experts to establish certain confirmatory connections among experiences consistent with our own socially constructed meaning systems, so through the process of interviewing, it is also possible to emphasise responses congruent with our own professional practice ideals and to deflect or ignore those which differ. Indeed, there may even be some which we fail to see altogether.

Conversely, for the reflexive practitioner, interviews also potentially highlight the negotiated quality of our relationships and demonstrate the political and social aspects of our attempts at making sense of the world. From my own experience I began to understand that in relation to my colleagues, the differences between our cultural backgrounds, the complex language problems and imbalances of power made it very difficult for my attempts to construct genuinely negotiated meaning with my local colleagues. As such, my attempting to 'gather' information, such as through interviews and even conversations with colleagues, widely advocated by models of international programme development and my own action orientated professional frameworks, was also far from unproblematic. However, despite these problems, systemic sensibility to the complexities surrounding the use of interviews and conversations generally may also be able to sensitise experts to how the process of coming to know or to understand some 'thing' in the world is never straightforward, but is part of a contested process and always embedded in the political, historical and social.

#### **4.5.4. Problem Identification**

Either following or inherent to the 'reconnaissance' phase, most action research and professional problem-solving approaches advocate an early 'problem identification' step. Regarding educational innovations for example, Havelock and Huberman (1977) also claimed that the process through which needs were recognised and defined as problems

was one of the fundamental stages in the process of implementing such innovations and necessary in order that subsequent solutions might be discovered. Within Chapter III, I also discussed how, from arriving within Namibia, I endeavoured to identify problems to be addressed and thereby areas in which I felt I could make a useful contribution. Yet, thinking about that phase of my involvement systemically, suggests that the apparently natural step from which to begin to formulate plans for later professional action is also far from straightforward.

That problems existed which were to be solved, I instinctively took for granted. After all, my presence had been requested by the ELCIN management and so it seemed natural to expect to 'discover' problems in need of solutions. As I have described in Chapter III, I was able to 'identify' numerous areas in which Department Three appeared to be experiencing difficulties which my expertise might remedy. In many respects the existence of problems was necessary to justify my very presence, and my presence recursively attested to the presence of problems which warranted my expert attention. At that early stage, so natural did these circumstances appear that I never paused to consider what role I too may have played in the conjuring up of the problem list.

I did not reflect on how the nature and number of apparent problems may have stemmed from the models of expert engagement through which I understood my duties and in which I had been thoroughly versed through my professional training. I never considered how the mechanistic language of the problem-solving approaches that I implicitly followed could also too easily divert attention away from that which was positive and successful and readily encourage a problem saturated view of the practice context and of others. At the early stage of my involvement at the Engela Training Centre it was also beyond my conceptual horizon to consider that the structured behavioural action models I used to understand my practice readily portray problems as somehow objectively 'emerging', rather than alternatively their being also potentially and subjectively created and constructed by the expert such as in the course of problem-setting (Schön, 1991). Such problem-solving models do not accommodate or acknowledge that problem generation may also owe its existence to the social narratives of professional engagements and the scripted terms of engagement in the expert-colleague relationship. Consequently, primed by the deficit descriptions I had gathered from my initial few induction days at the ELCIN Rehabilitation Centre, coupled with my



own expectations of Africa, I can now appreciate how I invested relatively little in trying to identify any narratives of success that might have been present at the Engela Training Centre or within Department Three. Nor was I alone, as it seemed my departmental colleagues were equally immersed in problem saturated narrative understandings about their department's plight.

Reflectively, I can now appreciate how from a social constructionist perspective 'problems' may also be considered as the products of our particular discursive formations and therefore related to our own particular linguistic and cultural locations. This view is of course contrary to the first-order understanding of 'problem identification', which largely shapes psychological theories, which embrace ideas of individual, internal cognitive information-processing models. These cognitive models generally understand problem identification, not in social terms, but as part of a process starting from when the expert initially surveys a scene, thus providing 'information input'. According to such models, this informational input is then processed with the expert utilising their prior knowledge, understanding and experience to identify and list identifiable problems. These problems are usually perceived to be a property of the context being observed and unrelated to the 'observing' expert. To this extent, problems might be conceived as real 'things' and especially 'deficit things'.

Once problems are identified, cognitive models usually propose that problems are reflected upon, as the expert considers the range of options that are believed to be practicable and available to solve the problem. According to the information processing model of expert agency, each potential solution is weighed-up and contrasted with others in terms of its feasibility, advantages and disadvantages, so that finally the expert's task is then to determine the most suitable solution (information output) which is chosen to complete this neat, rational decision-making process.

However, as I have suggested, a systemic social constructional perspective, acknowledges the tendency of experts to construct views of the context which allows them to represent, codify and to make sense of such contexts in rational and familiar terms, so as to allow the imposition of familiar solutions. Indeed, according to McNamee and Gergen (1992, p. 1):

“Problems and their solutions do not spring from the soil of simple observation. Whether we locate a problem for which a solution is demanded - for example, an illness for which a cure is required - depends not so much on what is before us as behind”.

So perhaps, if much of what I initially perceived within Department Three consisted of problems and disorganisation, it could have been because events and the context simply refused to compose themselves as a picture that I, with my Western perspective, could easily read. Indeed contemporary critical and postmodern literature regarding international development (e.g. Escobar, 1995) suggests that many Western experts cope with what they see as ‘chaos’ as a representation of ‘underdevelopment’. A systemic analysis appears therefore to offer different understandings of the process of problem identification, a process which is fundamental to many expert approaches. Consequently, the list of problems that I saw as ‘existing’ within Department Three were clearly also very much shaped by my own assumptive world and professional network of conversations. Nevertheless, I take some reassurance in that it seemed that the picture of disorganisation that I perceived within the Department, also appeared to be shared by my new colleagues. This might be inferred by their expressed concerns about their own practice and also their willingness to consider changes as I have described.

However, as I have learned from thinking about my own practice, I believe that experts may do well to usefully pause and reflect on the representations they are constructing. As Burke (1985, p 20, original emphasis) claimed, “every way of seeing is a way of *not* seeing”. A social constructional sensibility may therefore help experts to acknowledge that we negotiate and agree what represents a problem, that is reality, through the processes of language and communication, intertwined with the dynamics of power play and that, as such, there are multiple possible versions of reality.

Given the possibility of systemically recognising multiple and perhaps competing realities, how might the expert proceed when trying to identify areas for change? White (1997) suggested that practitioners might overcome the possible confusion of multiple interpretations by distinguishing between ‘thin’ and ‘thick’ descriptions. According to White, ‘thin’ descriptions are usually derived from the observations of outsiders, such as expatriate experts, who are unlikely to have access to the meaning systems of those they are working with. In such circumstances, as I have described above, experts risk



narrowing the range of possible explanations and perspectives about a particular context or set of problems. Alternatively, ‘thick’ descriptions are those in which wider interpretations are included, such as through more prolonged expert involvement and by collaboratively working with local colleagues who share in the process of problem identification. This greater awareness derived from ‘thick’ descriptions, coupled with a form of tentative, critical hypothesising in which many possible perspectives of the problem situation are generated, as I shall later refer to in Chapter VI, may serve according to White, as a means to elicit a wider range of action courses from which the expert might ‘safely’ choose a course of action.

#### **4.5.5. Consultation and Collaboration**

As I experienced within Namibia, in addition to language problems, attempting to work collaboratively such as towards ‘thick’ descriptions is not without its own difficulties. Despite my best intentions to try to fully consult with my departmental colleagues I initially found that they appeared to be unfamiliar with consultation as I understood it. Indeed, my attempts ‘to consult’ even seemed to run counter to their expectations of how I should proceed in my expert duties. As I understood the situation, my colleagues expected that, as the expert, I should surely have a clear plan based upon my experiences in the United Kingdom working with children with learning difficulties. In this respect my colleagues’ views were similar to those experienced by Walker (1994), who attempted to teach action research approaches to teachers in South Africa. Walker noted how the teachers became confused by the collaborative, non-directive stance she initially proposed. Walker cited one teacher’s statement that “at first I couldn’t understand what you were trying to do because when you called us together you wanted ideas from us...I thought you were going to give us ideas” (pp. 67- 68).

Of course, this was my interpretation of my colleagues’ beliefs gleaned through the difficulties of communication I have described above. Nevertheless, I soon realised that most of my colleagues and certainly those within Department Three were quite ready to defer to whatever recommendations I came up with and very reluctant to raise suggestions themselves. At the time I was concerned that this seemed all rather unpromising for the collaborative practitioner approach I had hoped for. My colleagues did not seem to see themselves as potential active participants in the decision-making process, but rather just as implementers of practice.

I might have taken some comfort from Elliott (1982), who suggested that an action research style of practice, rather than being imposed on teachers, might evolve organically from the existing educational culture of innovation and notions of reflective practice. However, unfortunately in the circumstances present within the Engela Training Centre on my arrival, we appeared to be starting from a very low baseline with, as far as I was aware, little evidence of any existing educational culture of reflective practice. Fortunately, my unfamiliarity with local circumstances did ensure that I was able to encourage some consultative involvement with colleagues, which served as a precursor to my later developing more authentic participation and what I believed was a sense of joint ownership and responsibility for changes within the Department.

Paradoxically, perhaps the language difficulties, despite the problems they caused, may have also ensured at least that those few colleagues who spoke English had by necessity to be involved at some level in consultation, as I was effectively 'voiceless' without their support. Nevertheless, the initial 'consultations', so crucial to even my first-order understanding regarding the process of change, were initially barely collaborative and were largely characterised by my asking my colleagues questions and their supplying the answers, and this too must have had a significant bearing in key aspects of how my role unfolded and the establishment of the Engela Portage Programme.

Clearly, developing collaborative practice within the didactic expectations of others inevitably demands some rethinking as to how practice which follows a problem-solving approach or the accepted models of practitioner and action research might be implemented. Traditional notions of practitioner and action enquiry tend to largely down-play the possible influential role of the expert managing the intervention, such as in my own case when events and circumstances dictated this as unavoidable, at least initially. Consultation is largely portrayed as a necessary process but is rarely seen as problematic, beyond the mechanics of ensuring all relevant participants are consulted. Certainly my previous understanding of the Problem-Centred Approach was that consultation consisted of inviting all those involved to contribute their ideas and suggestions which the psychologist, as an outside expert, would record for later collaborative scrutiny and consideration. However, I found that my role was far more central within Department Three. I had been invited by ELCIN to share my expert



knowledge and skills with my colleagues, as well as to take responsibility for the management and direction of the Department. Indeed, it was expected that I would inevitably import my own new ideas and strategies in my active role as Head of Department. This active participation usefully, I believe, blurred my insider-outsider status, as construed by more formal notions of action research and practitioner inquiry, but also further rendered complex the nature of the consultative and collaborative endeavour in which I was engaged.

Of course, within the contemporary research literature, it would be exceptional today to encounter literature related to educational change that did not advocate collaboration at some level as an essential feature of the change process. Indeed, from the outset of my involvement with Department Three, I never questioned that collaboration with my colleagues would form the basis of any changes that I introduced within the Department, with this expectation stemming from my earlier professional training and the problem solving models to which I had been exposed. Advocates for the use of collaboration in introducing educational and social changes abound. Lewin (1991) for example claimed that, in regard to innovative educational change in developing countries, the weight of evidence supported the view that consultation and collaboration, including recognising the interests and motivations of local colleagues and their participation in the decision making process, together with evolutionary rather than revolutionary change, led to sustainable and beneficial programmes.

Indeed, the term collaboration now represents a popular buzz-word, certainly within contemporary practice and research literature related to social change and as a response to the postmodern problems of planning, development and change. As Hargreaves (1995) claimed, collaboration is lauded for the supportive sharing of problems and pressures, and the democratic generations of solutions, that it appears to offer. It is reputed to ensure greater consistency of expectations, shared responsibility and a fuller diversity in the approaches being considered and attempted, while reducing redundancy of effort through the pooling of knowledge and experience. In short, collaboration appears wholly esteemed by contemporary approaches to programme innovation and its use serves as a badge to authenticate the supposed ethical correctness of practice.

Yet as I have indicated, collaboration is not without its difficulties and, as Hargreaves (1995, p. 155) also explained, collaboration “can be helpful or harmful” and that, in determining which it is, it is necessary to examine “the context in which it takes place, for it is this which, in many ways, defines the purposes, consequences and limits of collaborative work”. According to Hargreaves, the down side of collaboration is that it can be both comfortable and complacent, failing to challenge existing practices, or conformist through ‘group-think’ suppressing both individual voices and creative alternative ideas. Hargreaves was also concerned that, in certain contexts, collaboration may simply be unnecessary, but employed for the sake of appearances or otherwise contrived for administrative expediency and control, again silencing more original, potentially challenging ideas.

While I have described how I was fuelled with the desire to work collaboratively with my colleagues, I eventually also came to appreciate that my own early understanding of collaboration was indeed rather limited. I initially saw collaboration as concerned with the presenting and sharing of ideas for collaborative discussion, then arriving at a decision democratically and later working collaboratively alongside my colleagues to implement the agreed action. But through my experience and reflection of the problems of practice I later appreciated that this type of collaboration is rather two dimensional. It neglects the further collaborative steps which are the most challenging but conversely also the most fruitful. That is, it is through the further collaboration of meaning and understanding that potentially new forms of understanding are forged, that reflexivity may be fostered and that the processes which elicit and maintain collaborative interaction, con-joint understanding and dialogue are unveiled of which I shall discuss in greater detail in Chapter VI. Consequently, as professionals, our understanding of this often taken-for-granted term may clearly benefit from further critical reflective examination, if we are not to risk collaboration being concerned solely with technical, instrumental action or even as a further vehicle for the subjugation of colleagues’ contributions.

In addition to these concerns regarding the potential misapplication of collaboration, its practice in a cross-cultural context may be further complicated. The literature on educational innovation in developing countries seems to imply that collaboration is simply another universally applicable process. Yet, given the diversity of individual,



family, ethnic and religious aspects found in many cultures, this may render problematic technical understandings of collaboration and the expert's attempts to enforce collaboration.

Again, reflecting upon my involvement within the Engela Training Centre and specifically Department Three, there were many possible cultural, historical and social explanations that might have systemically accounted for my colleagues' initial reluctance to take an active role in the collaborative consultative approach I tried to engage them in. Perhaps, given the legacy of a Bantu education that many had experienced and their familiarity with authoritarian management models, it was rather naïve of me to believe that I could initially fully and consultatively engage them collaboratively. At that early stage following my arrival, my colleagues may also not have wished to share their thoughts with a Western stranger, whose very presence may have undermined their confidence in asserting their own ideas. It is also possible to imagine that their experience of living for many years under hostile and war conditions, both as refugees and living in an 'occupied' country, may have made them cautious of sharing their beliefs and ideas, particularly with someone they did not know well and who did not share their culture.

Despite later improvements in our relationships, I never really managed to ascertain whether there were wider cultural or historical explanations for why initially my colleagues had appeared so reluctant to take a fuller role in the collaborative consultation I offered. Perhaps this again serves to demonstrate how, in a cross-cultural context, even elementary stages of conventional action research or problem solving professional practice can be extremely complex and should not be taken for granted. As it happened, within the Department we did gradually evolve a more collaborative and consultative relationship, although this took several months before it approached what I had initially expected it to resemble. Indeed, later our collaborative and consultative relationship continued to evolve far beyond that which I had experienced working within the West, as I too began to develop my reflexive skills and to appreciate my colleagues' perspectives and systems of meaning.

#### **4.5.6. Notions Of Reflective Practice**

As with my attempts to practice collaboratively and to actively consult my colleagues, I also found that initially it was very difficult to encourage them to reflect upon and question their own practices at that time. As I described in Chapter III, while my colleagues seemed to generally express dissatisfaction with how they managed the Department, it seemed difficult for them to be more specific about their concerns. Indeed, I wondered whether, to some extent, their concerns might have more accurately reflected their awareness that others were unhappy with their achievements and that consequently they too should expect to be dissatisfied. It is also possible that, as they were being asked to reflect upon their practice by a virtual stranger and supposed expert who was in a managerial position to them, this added to their unwillingness to comment specifically upon their practice. This too may have been compounded by the apparent low morale of my colleagues within the Department and the complexities of the local political relationships within ELCIN at that time.

Difficulties with encouraging staff to reflect upon their practice have been noted in other research studies within African countries. Stuart (1991, p. 132) for example attributed similar interpretations of passivity to the Lesotho teachers' "lack of confidence...lack of time or opportunity to think through what they were doing, reflect on their practice and articulate values and theories".

Pryor (1998, p. 223) also saw such difficulties as related to teachers' understanding of their roles, noting in Ghana that:

"the main problem was not so much that action research appeared difficult to fit in, as that the practice of reflecting on one's own actions seemed so far from their experience.... their lack of agency goes right to the roots of their understanding of what was their role in the classroom".

Indeed Walker (1994, p. 67) also noted in South Africa that, "teachers were not only unfamiliar with any notion of themselves as curriculum shapers, at times they actively resisted such a role".

As with the questions of consultation and collaboration described above, it is possible to construct a series of explanatory narratives to account for my colleagues' apparent difficulties to reflect. I have wondered whether the effects of decades of colonialism



upon the local culture, and a history of domination by foreign regimes, may have discouraged critical thinking. Likewise, aspects of the traditional indigenous culture could possibly have discouraged critical challenges and thinking, to ensure acceptance of traditional practice, including deference to elders and superiors. This may have been especially true for women, who formed the majority of my colleagues at the Engela Training Centre. Tabulawa (1997), in attempting to explain teaching styles within Botswana schools, also argued that the continuation of highly didactic teaching techniques could be accounted for by a number of sociological and historical factors. Tabulawa suggested the importing of bureaucratic-authoritarian educational models of 19<sup>th</sup> Century Britain, and the related missionary belief in the supremacy of Western ideals, together with the authoritarianism inherent in Tswana society, may have all contributed.

For Western experts concerned with causality, I am sure it is possible to construct a host of narratives to explain the apparent lack of reflection and the passivity of my colleagues. Moreover, what is important is that different stories are likely to have different consequences for how experts work with colleagues, such as whether our explanatory narratives reify notions of the submissiveness of others, or whether we choose alternative stories which highlight their positive struggle for their denied agency. These complications also serve to again emphasise the need for caution and systemic reflexivity upon the complicity of experts in this process of representation.

On reflection, the explanatory narrative that I believe I privileged to account for my colleagues' apparent reluctance to reflect on their roles and generate ideas for change, was probably their low morale and their suspicions of me as another modernising Westerner, the impact of several of whom they had already witnessed within the Engela Training Centre generally. As I have described, the approach which I followed was to try, despite its unfamiliarity with my colleagues, to engage them in a constant dialogue concerning what was happening locally, their opinion on various topics and issues and to share my ideas for change as and when they occurred to me. Clearly my colleagues' reflective abilities and their willingness to share these with me were closely linked with the process of collaboration I have described above. In this sense we can again see how collaboration is a multifaceted concept, which can be interpreted at various levels. Initially, I am aware that our collaborative efforts were probably centred upon issues and

topics that I identified as significant to instigating change and developing my professional role within the new context. However, I am also aware that over time, as we began to more openly share our reflections, so my departmental colleagues began to take a far more explicit and collaboratively active role in steering the course of change within the Department, so that responsibility for the Engela Portage Programme became more equally shared. Whether this gradual change eventually boosted their morale, familiarised them with less didactic approaches to learning, and/or mitigated the effects of their colonial expectation, and so on, I am unsure. However, the change in the quality of the interpersonal relationships regarding collaboration, consultation and my colleagues' and my ability to reflect upon our practice, clearly had implications for another fundamental process of innovative change, decision-making.

#### **4.5.7. Decision Making**

An awareness of the complexities that are associated with collaboration also encourages a critical analysis of the relational aspects of the decision-making process. As Havelock and Huberman (1977, p. 194, original emphasis) claimed in regard to educational change in developing countries, “the *pattern of participation* among the members of a social system in the decision to adopt or develop an innovation is probably the most central issue in the process”.

Following their analyses of educational innovation attempts within developing countries, Havelock and Huberman (1977) acknowledged that all persons involved inevitably had some stake in both the process of change and, just as importantly, in the process of implementation that follows the decision to begin change. While recognising that in reality there are likely to be limitations to the extent of participation, the authors nevertheless viewed wide participation as essential, not only as this was socially and morally desirable, but also due to the fact that it was functionally necessary if the innovation was to succeed as intended. However, Havelock and Huberman (1977) lamented that, from their survey of innovations, it appeared that decisions were primarily taken by ‘small cliques’ and the participation of others was often overlooked.

As a newly arrived expert, I was very keen to involve as wide a range of people as possible. I have described in Chapter III how I tried to include my other colleagues at the ELCIN Rehabilitation Centre and Engela Training Centre in discussions about changes



to Department Three, but that essentially, while interested and content to make some contributions, I had the distinct impression that, with potential changes in the Engela Training Centre management and funding ahead, they had other primary concerns. Effectively, direct participation in decision-making rested with my departmental colleagues and myself. With such a small core of people involved, this might be seen as simplifying the whole decision-making process, yet, as I have also described in Chapter III this was a process characterised by both anxiety and excitement for all, as we all had some investment in the changes being successful, not in the least my colleagues whose continued employment may have been at risk if the Department had not been perceived to be successful following any changes. Reflectively, I can therefore also understand that the process of decision-making is far more complex than a concern with the pattern of participation as described by Havelock and Huberman would suggest.

My first-order account of the Planning stage in Chapter III may have conveyed an image of the decision-making process within the department being fairly uncomplicated, despite our anxieties about the potential risks of change. I believe that the ease with which decisions were apparently reached perhaps reflected the measure of collaborative and inclusive working relationships that we had managed to develop by that time, from working together during the Preparation stage, and the fact that we seemed to have shared similar visions as to how the Department might be improved. Conversely, this lack of friction might have also signalled how unduly influential and persuasive I remained and the willingness with which my colleagues deferred to my alleged expertise. Conceivably, had there been an explicit difference of opinion, the process of change might also have been far more educational and generative for all.

I have wondered whether my concerns with the pace of change may also have influenced aspects of the decision-making process that took place within the Department. I was certainly aware of a tension between my desire to prove my professional worth and my professional obligation to be seen as knowledgeable, against the need to delay implementing any change in order to learn as much about my colleagues' understanding and views as possible. As I have described above there were also significant social and power dynamics associated with change and decision making which need to be reflexively considered.

Fine and Turner (1991) used the relational concept of ‘space’ to understand the dynamics of decision-making, such as the dilemma for the expert between the need to generate sufficient thinking ‘space’ and the pressure for action. As was my own experience within Department Three, I recognised that space was also needed to move gradually towards the establishment of a more collaborative and consultative relationship with my colleagues in which we were not simply engaged in discussion but also in generative and reciprocal dialogue. Using the concept of ‘space’, Fine and Turner (1991, p. 309) also referred to how the practitioner’s preconceptions, beliefs and ideas could potentially ‘tyrannise’ space by “ruling a person’s thoughts or actions, leaving little if any space for the consideration of alternative points of view, either with respect to self or others”. Conversely, they claimed that practitioners could aspire to ensure ‘freedom’ or the opening up of space which may, “leave space for the consideration of alternative points of view” (p. 309), and thereby more informed decision-making.

Clearly experts also need to acknowledge the importance professionally of some ‘boundaries’ (Burnham, 1993) which, within the discursive space, may help to set a focus in relation to their practice. This ‘middle way’ may offer a potential space for the exchange of ideas and mutual respect of alternative worldviews, and be one which is not tyrannised by the narrow boundaries or closing of space defined by the practitioner’s presuppositions or their previous experiences and beliefs. As a pragmatic compromise for the expert, this may allow sufficient freedom to explore new forms of knowledge and alternative worldviews, while ensuring that these can be focused to meet the expert’s negotiated aims. Of course this requires that the expert holds back from a too hasty active intervention towards implementing change. Borrowing from systemic therapeutic approaches, this seems to suggest that developing a deliberate ‘not-knowing’ stance might also be helpful in creating sufficient space (Goolishian and Anderson, 1992) and I shall return to discuss this systemic practice concept in Chapter VI.

#### **4.5.8. Pressure For Intervention and Action**

As I have mentioned, decision-making and the generation of ‘space’ is pressured from various directions, not the least of which is the professional imperative to be useful. As I imagine is the case with many expatriate experts, I certainly felt that there were high expectations that my involvement at the Engela Training Centre should make a difference. This pressure to agency may have originated from both my own professional



training and personal expectations, as well as from the expectations that I believed VSO, ELCIN and my local colleagues placed upon me. I can recall how, from an early stage of my involvement with the Engela Training Centre, these imperatives seemed to urge me to quickly adopt a Problem-Centred Approach and commence the processes of problem identification and drawing up of proposals for action which would ultimately justify my presence. As an expert initially on a two-year contract, the temporal boundaries for my involvement were also clearly laid before me and acted as an omnipresent measure of my progress.

Of course the time scales and priorities to which I felt obliged to work were not necessarily those of my colleagues, but were probably Western in origin and specifically related to my own professional understanding. This notion of urgency is also revealed by Leach's (1991) description in which she complained of an apathy by local indigenous management staff (p. 170) within Sudanese projects. An alternative narrative is that this apparent inertia reflected the lack of engagement of local colleagues in the task at hand, or it may possibly even have represented passive resistance to the 'development' initiative and an imposed foreign time-scale and set of priorities.

As I described regarding my own eventual transformations in understanding about Portage and my expert practice in Chapter III, as I became more accustomed to working alongside my local colleagues, and more reflective and reflexive concerning my role, I began to develop a different understanding regarding my self-imposed and other imaginary deadlines. When becoming frustrated by the pace of change, which appeared slow when measured against my Western expectations, I regularly found it helpful to reflect on the very audacity of my presence in Namibia and my presumption that I had something to offer and my colleagues an obligation to accept.

Reflecting on this concern with time and rate of progress also helped to remind me that I was perhaps again beginning to allow a preoccupation with the 'mechanics' of implementing the Engela Portage Programme to become divorced from and to overshadow the more important social and cultural aspects of the process of change. My frustration with the rate of change also served to indicate that I might have been arrogantly assuming too much personal responsibility for what necessarily had to be a joint endeavour. Consequently, when frustrations with the rate of progress arose, as with

many other apparent problems during the course of practice, I later began to learn to appreciate that these occasions were often learning opportunities and generally reflected how I had perhaps somehow again grown out of 'synch' with local priorities and that some deliberate reflections about alternative perspectives were probably called for.

#### **4.5.9. Effects Of Power Inequities**

In this chapter so far I have considered some of the systemic, relational problems and issues which I recognised both during and after my experience in Namibia and which also complicated and rendered too simplistic a first-order account of my expert practice. I have particularly described issues that identify both the constitutive and the potentially delimiting effects of Western professional discourses and worldviews. I have also suggested that, as a Western expert, I was motivated by a desire to support those with whom I worked through applying what I believed to be best collaborative professional practice but that, in so doing, as evident by my 'desire', power issues inevitably became endemic. As I have described in Chapter II, a concern with power issues is one of the key themes which runs throughout this thesis and these issues are pertinent at many levels to the subject of Portage expert involvement in cross-cultural contexts within developing countries.

Regarding the broader level of international development, Sachs (1992) and Kalyanpur (1996) have suggested that this has been understood almost exclusively in terms of one knowledge system, namely the modern Western one and that the dominant power of this knowledge system has resulted in the marginalisation and disqualification of non-Western knowledge systems. The effects of power are also largely overlooked in most texts related to expert engagement and Portage programme development within developing countries, which usually assume a benign view of expert practice. However, as this thesis contends, I believe that questions of power, along with expertise and commitment, should represent key concerns of Portage experts working in cross-cultural contexts in order to provide a more thorough understanding of our expert role and influence. Indeed, given the usually influential role of the expert, with their potential power to impose certain meanings rather than others, the ethical stakes surrounding issues of power could be said to be high.



Power can be construed in the traditional sense in which power is understood to be something which can be possessed and which it is possible to have more or less of. Power in this sense often refers to an individual's or group's ability to cause other individuals or groups to do that which they would not have otherwise done, such as by dint of status or hierarchical position related to power. As Head of Department I ostensibly had overall responsibility for its management and my departmental colleagues were therefore subordinate. Likewise, as a white male working with local black, female colleagues from a traditionally patriarchal culture, and where at least in certain quarters, historically, white people were deferred to, it could be argued that this also represented a source of power and influence. It is also possible to conceive that my Western professional status may have conferred some greater power to my role in the decision-making within the Department. However, in post-war Namibia, working with colleagues who took an active part in the liberation struggle and who were part of a society in the process of dismantling the effects of colonialism, some of these hypothesised sources of power could also be dismissed. Also, as I have described in the first-order account of the Programme and mentioned above, my circumstances within the Engela Training Centre regarding my considerable dependency upon my colleagues for any professional agency, also undermined any power, in the traditional understanding of the term, that I might have to influence events without their consent and collaboration.

However, from a systemic analysis it is the more pervasive postmodern conceptions of power, such as the modern insidious forms of power described in the works of Michel Foucault (Foucault, 1975; Rabinow 1984) which are of concern. As I outlined in Chapter II, Foucault examined the manner in which relations of power, dominance and submission are embedded in social discourse. Foucault's work aimed to examine how forms of knowledge, rationality, social institutions and subjectivity, that to Western society seemed given and natural, were in fact contingent constructs of power and domination. Foucault's analysis concurs with a postmodern understanding of language in which it is viewed not as an innocent device for describing the world, but rather as having the power to enchant us into seeing in particular ways, such that we project our socially constructed categories outside of ourselves, and then treat these categories not as language fabrications but as if they are 'real' as I have described in relation to my own conceptual background. This concept of power does not see power as being invested *in* particular individuals or groups as such, but that we all operate *within* its influence, by

subjection. Foucault, however, also recognised that we do not all share equally as individuals in the exercise of power/knowledge and that its effects subjugate some more than others.

Foucault's analysis of power is useful in that it can also provide a broader understanding of how relationships within Department Three might be perceived. Power might have been said to have been exercised through the quiet assumptions made by myself and my colleagues, based upon my and their premises. Of course, this relationship is reciprocal and it is quite possible to conceive of the power exercised by my colleagues, based upon their knowledge and expectations of what they presumed my role was or should be, which also influenced my own beliefs concerning my role.

Given these complexities, how should an ethically reflective practitioner proceed? I think that perhaps the task for professionals is not to try to relinquish or escape the power they wield as experts, as this is most probably part of the baggage that comes with the title 'expert', or at least in those situations where local colleagues have some faith in the expert. Indeed, as Mason, (1993, p. 192) claimed, as experts we should not be drawn "into the trap of equating a belief encompassing uncertainty with a view that we cannot own our own expertise". In such circumstances, experts perhaps need to recognise both their power-laden influence, but also concurrently to respect the power of colleagues to contribute their meanings and narratives to the dynamics of the intervention enterprise. Overall, I believe that it is helpful, ethically, educationally and even practically, if as experts we attempt to learn how to critically examine the social and personal processes related to power relationships that we use to engender meaning, our theories. We need to remain vigilant to their potentially restrictive and oppressive roles, as well as their productive aspects. Inevitably, every personal and professional treasured theory that we employ necessarily creates some form of meaning and understanding, while also oppressing other alternatives. Unquestioned, our beliefs may come to restrictively regulate how we think and behave.

Of course, I now have to also include my own sympathies with various postmodern notions and social constructional, second-order systemic beliefs among these de-limiting and constitutive frameworks. For example, it is interesting to consider how, in terms of my eagerness to 'empower' my colleagues, through striving to develop a more



collaborative working relationship, I may have denied them the control over the choice of expert that they felt they needed. Equally, I may have used the appearance of collaboration to disguise the imbalance of power at work. After all, although collaboration presumes that everyone has the opportunity to participate, it does not necessarily mean that all participate equally. Through my reflecting upon these power questions of systemic relationships related to my own practice I believe that the concept of power is something that the expert generally might do well to remain vigilant to throughout their practice. While it may present some ethical conundrums, with no ready means to resolve, I feel sure that overall the greater risk is in our denying other suppressed alternative ways of understanding, which may have valuable contributions to make to our developing understanding and knowledge production and to our professional practice. Within the following chapter, I will try to demonstrate this point further through a broader consideration of, and reflection upon, key cultural issues which surrounded my expert involvement within Namibia and which I believe are also crucially pertinent to the international expansion of Portage.

## Chapter V

# A Consideration Of The Place And Role Of Cultural Issues In The Wider Systemic Relationship Between The Portage Expert And Those They Work With

### 5.1. Introduction

This chapter represents the product of a further stage in the exploration into, and desire to expand, my understanding of my expert practice, particularly in relation to Portage. As such, this chapter forms an important aspect of my ongoing professional development specifically related to the challenges of engaging with cultural difference. Indeed, engaging with the literature related to a diverse range of cultural concepts has helped me to further question and re-theorise my expert practice. As I explained in Chapter II, new paradigm understandings of research encourage practitioner-researchers to begin to reflexively examine their own presuppositions regarding their practice-research and to acknowledge the socially constructed nature of knowledge. I believe that this reflexivity can also be assisted by the exposure of experts to the wide range of different beliefs of others held about familiar cultural ideas and concepts. In my own case, as I have described, this was initially achieved through my direct contact with my Namibia colleagues, although I have also continued this process subsequently through engaging with the relevant cultural literature. Building upon the systemic second-order analysis of my practice described in Chapter IV, a major proposition for writing this present chapter therefore centres around my belief that in our work as Portage experts with colleagues and others from different cultures, an awareness and a radical reconsideration of our Western cultural beliefs and practices is necessary to promote more contextually relevant practices.

It is important to stress however that I am not suggesting that as Portage experts we should dispense with our own cultural views, but rather that we engage in a possible re-visioning of our theoretical views and their associated practices. I am concerned that, as experts, if we do not broaden our understanding about cultural difference and diversity of worldviews to include many other possible ways of viewing the world, then we will risk potentially continuing to submerge, or even pathologise, the beliefs and views of others. Moreover, in terms of our interpersonal relationships with colleagues and others from different cultural backgrounds, we may also jeopardise these relationships by possibly



offending or distancing those who do not fit with our Western dominant and normative descriptions of concepts such as disability, child development, etc.

Consequently, within this chapter I have also aimed to introduce a wide range of literature on specific cultural differences which I have used to identify to the reader areas of potential dissonance between Western Portage educational professionals and our colleagues and families from culturally diverse backgrounds. Additionally, I am concerned that as Portage experts, to go about our expert practices in a context in which we know we are working with others from different cultural backgrounds and who hold non-Western cultural worldviews, without attempting to understand the diversity of these cultural intelligibilities, is a form of cultural solipsism.

Importantly, within this chapter I also intend to continue to demonstrate how a social constructionist sensibility might help the Portage expert organise a constant interrogation and vigilance to how processes of ideological persuasions, such as those within the assumptions of Portage programme, translate themselves from cultural invention to natural assumption. Indeed, the history of European involvement in Africa suggests that this is a long-standing problem. For example, Serpell, (1993, p. 106) claimed that:

“It seems that no one asked when exporting European education to Africa: how do African societies conceptualise children and their needs for socialisation? Instead, a set of interdependent equations, which had become established within orthodox Western thought and which are deeply ingrained in institutionalised practices of formal education, were exported to the peoples of the Third World under the label of opportunities for enlightenment, liberation and enrichment, and which in practice often serve the very opposite purposes of mystification, oppression and impoverishment”.

Serpell (1993) was referring to how most analyses regarding the exportation of Western educational ideals and practices to Africa brought about by colonisation have tended to overlook the wider socio-cultural significance of the imposition. Importantly, I would add that such imposition has also failed to consider the wider systemic implications of the process of change; how local people could and should be directly involved in that process rather than simply presuming that educational ideas should be adapted to ‘fit’ the local socio-cultural context. Historically, there has been little recognition that the meaning systems in place locally and the readiness or otherwise for change are vital to determining if, how and when change can occur. Perhaps it is the overlooking of what I

have termed the systemic and relational aspects of change which has contributed to, as Escobar (1995) claimed, the dismal failure of forty years of international development. I am therefore concerned that with the present day burgeoning wave of special educational needs and disability programmes such as Portage to other cultures that there is again in this post-colonial period a pressing need to re-examine these issues.

I am particularly concerned that to date the Portage literature appears to largely imply an assumption that present day accepted Western concepts such as those of childhood, disability and 'mental retardation' and the Western understanding of the practices of parenting and child-rearing, unproblematically reflect categorical, objective and universal truths. Within the modernist paradigm that presently continues to largely dominate the narratives of Portage, these beliefs and understandings of practice seem to have effectively become reified and so deemed to be 'natural' and there is relatively little overt acknowledgement of their conceptual assumptions or culture bound nature and how cultural differences may have very significant implications when attempts are made to apply the Portage Programme to other cultures. A danger here is that this can lead to a further assumption that such programmes might be relatively straightforwardly transferred to other cultures with only minimal changes (e.g. APAWMR Report, 1987; Oakland, 1997).

Moreover, even when the importance of appreciating the diversity of different cultural views has been recognised within the literature this is usually with a view of primarily encouraging experts to sensitively adapt their programmes to match local cultural meanings and beliefs or to build upon and manipulate local practices so that they shift more in line with 'scientific' ways of thinking and practices regarding child-rearing (e.g. UNICEF, 1993). Important although this process of cultural appreciation is, I believe that this alone is insufficient. Portage itself also has to be understood within the cultural framework in which it was designed and should not be considered as culture-free. Too often it appears to be assumed in the literature related to Portage that culture is something that 'others' have, whether they be ethnic minority groups in country or those outside of the West, while in contrast our own Western concepts and ideas are seen as somehow more objectively elevated and unsullied by tradition and custom. This tendency might be seen, for example, as I suggested in Chapter III, in the narrow first-order questions asked by some experts about the cultural views and practices of local



communities in developing countries, regarding the appropriateness of programmes such as Portage.

I should add that by highlighting a range of selected key cultural concepts within this chapter, I do not intend to suggest that these have any greater significance on the course of Portage programme development or expert practice than others. However, I believe that by focusing on those selected, the significant affects of culture and the inherent complexities involved within this field are most clearly illustrated. I also acknowledge that while in attempting to describe these concepts in essentially individual terms this may be textually convenient, it may also appear somewhat artificial. Of course inevitably, in practice, it is the unique interrelationships between such concepts that is likely to be of most interest to the practitioner.

## **5.2. A Social Constructional Perspective Of Culture**

Initially, I think it is important to provide for the reader a description of my own understanding of the term culture, particularly by drawing upon social constructional ideas. I have noted that the term ‘culture’ is sometimes employed as if it is synonymous with ‘context’. For example, Sturmey, et al. (1992) in relation to Portage suggested culture related to demography, infrastructure, material resources, etc. However, within the general contemporary social and educational literature in reference to a wide range of topics, culture appears to more usually be a popular idiom related to and encompassing individual differences, diversity, choice, identity, etc. McLaughlin and Ponte (1997) for example, understood culture in terms of shared assumptions and quoted Hofstede (1980, p. 25) as defining culture as, “the collective programming of the mind which distinguishes the members of one human group from another”. Similarly, Ebbutt (1998, p. 416) defined culture as, “a constellation of both written and unwritten expectations, values, norms, rules, laws, artifacts, rituals and behaviours that permeate a society and influence how people behave socially”.

Within these various definitions, culture seems to be used to describe at one level the beliefs and values of a group, at another level their customs and traditions, but also at a further level a group’s achievements, such as its art and music. However understood, Reynolds-Whyte (1995, p. 240) cautioned that the use of the term culture sometimes

implied that, “cultures structure experience; they consist of a set of meanings that interpret the world in a particular way....as if a culture always provides answers to the questions people have”. In contrast, Reynolds-Whyte suggested that:

“people are actors within social contexts, not prisoners of a fixed cultural construction...Culture does not steer people; people create and re-create it from particular positions” (p. 241).

Reynolds-Whyte appeared to be criticising an essentialist understanding of culture, where culture is viewed as a discrete and distinct phenomenon which dictates how people think, feel and set their values. An essentialist understanding of culture implies that it, culture, has an existence outside of and independent of language and that individuals reproduce culture through their actions. This understanding of culture implies the establishment of a duality between the individual and the social. However, what appears to be absent from this view of culture is an acknowledgement that individuals in their very actions are also actively constructing new meanings and making choices.

In contrast, through a social constructional lens culture might be considered as a much more dynamic concept, one which understands individuals as actively participating in reproducing and changing their cultural contexts. Culture seen in these terms is given a new conception, not something external and objective which individuals learn and are initiated into but one in which it is understood as an enactive process. I have also described how social constructionists view the self as being constructed through and in language and narratives and that this is sometimes conceptualised systemically as the ‘networks of conversations’. From this perspective our knowledge of ourselves can be understood as social or interpretative constructions which adapt to changing social situations, rather than being immutable characteristics or existing in some independent or objective sense (Gergen and Kaye, 1992). However, through interaction with others, particularly those from different cultural backgrounds, this can lead to what I referred to as orthogonal interactions (Maturana, 1988) in Chapter IV, or ‘perturbations in the networks of conversation’, so that changes in our cultural understanding may occur through a ‘commingling of consciousness’ allowing new and unique possibilities of understanding to emerge.



Building upon the idea of culture as a systemic element and representing a set of basic beliefs derived from our backgrounds equivalent to the ‘assumptive worlds’ described by Abercrombie (1953, quoted in McLaughlin and Ponte, 1997 p. 103) it is possible to understand culture as in part related to general themes handed down to individuals from their families and other important people in their lives (teachers, etc.). These general themes, might be considered as inherent in the initial actions and functioning of individuals in particular cultural contexts, so as to provide a basic generative aspect to the cultural understanding of individuals.

However, these general cultural themes also entail interactive processes by which individuals recursively re-interpret their general cultural themes in response to their immediate and novel circumstances and social relationships. This is the further systemic and interactive aspect of culture in which individuals, in the light of their personal circumstances, are also able to reconstitute their general cultural themes into new understanding through co-constructing, reciprocally, with others. It is this much more dynamic and systemic understanding of ‘culture’ which it seems is rarely portrayed within the literature.

The constructionist conception and appreciation of the complex enactive understanding of culture tallies with my own experience within Namibia. Although the region of Namibia in which I worked had been relatively more socially isolated than other parts of the country and therefore might have been considered culturally more homogeneous and stable, I found that while there were clearly what I assumed to be cultural similarities in the ways that many of the families behaved and understood certain issues, I was also increasingly struck by the differences between the families that we visited in terms of their family responses to the Engela Portage Programme. Furthermore, my own stereotypical views of the local family culture were often shattered by my finding, for example, that elderly grandmothers, who I had assumed might be more culturally ‘entrenched’ and who initially had appeared to have relatively more difficulties understanding aspects of the Programme, were sometimes those who turned out to be most responsive to our involvement and more able and willing to adapt aspects of their behaviour so as to accommodate the more ‘Western’ elements of the Programme’s demands.

Super and Harkness (1986, p. 548) similarly pointed out how:

“individual people in different cultures have shown that... culture is orthogonal to personality, and the constructs that are useful for describing behaviour at the group level do not seem to apply very well to the explanations of individual behaviour”.

The insight for me then was to understand not only how culture was a much more dynamic conceptual phenomenon than I had at first appreciated, but how my essentialist view of culture had also encouraged me to see myself as the ‘expert’. That is, it had allowed me to adopt a ‘knowing’ position in regards to how I expected others to culturally behave. This is an inherent danger in a realist view of culture. To my more recent understanding therefore, the social constructional perspective of culture implies that that which is referred to as ‘culture’ is a much more fluid phenomenon and most helpfully understood as being both created and maintained through social relationships. Indeed, it is to this interactive ‘commingling’ and the recursive aspects of the process of cultural change to which I have referred throughout this thesis and which I see as an important aspect of my own reflective practice.

By acknowledging ourselves as part of an enactive systemic relationship with others and viewing culture as a fluid element also in that system, I believe that this helps to encourage us, the experts, to also acknowledge the subjectivity of our knowledge and descriptions. We can no longer claim objective knowledge of the social world, meanings, or the problems of those we work with. To emphasis my point, I believe that it is our sociality which is the basis of our communication with others, particular others from different cultural backgrounds and it is here that we must anchor our expert thinking about all our cross-cultural work.

Most significantly, I also believe that the essentialist view of culture tends to neglect the very issues and questions that I am particularly concerned with within this thesis. These questions are how, collaboratively and reciprocally, the expert together with their local colleagues and families might in their social interactions and developing relationships work towards and construct new forms of understanding, which might be understood as cultural shifts, in which each learns from each other. To reiterate, this is the fundamental understanding of the ‘change through exchange’ notion which I believe forms a basic



premise of systemic and social constructional ideas. For the constructionist expert therefore it is no less the case in a cross-cultural context that the primary challenge is that of contributing to generative social relationships - relationships from which both the expert and those they work with emerge with expanded potentials for effective relating and acting.

However, I do not believe that we can solely rely upon reflections of our social interactional and cross-cultural communications, as there will inevitably remain local and specific differences (the assumptive worlds or general themes) which act to partially shape and probably at least initially influence the way people understand, such as their ideas of disability, how children develop, etc. I therefore think that if experts are to begin to establish more equitable communications between themselves and local colleagues and families that this demands that these differences are also respected. This in turn also requires that these differences are 'known' about, so that experts can be alert to them. This 'knowing' should be understood as provisional, tentative and open to change. Also, by having some awareness of the great variety in the behaviour, thinking and feeling of others from different cultures this may help to stimulate the expert's imagination and intuition creatively within their reflective practice. This of course returns us to another recurrent theme of this thesis, reflexivity.

As I can personally attest to, acknowledging and understanding attitudes, beliefs and practices of different cultures can be very challenging. Perhaps this is particularly so, at least for Westerners, in the emotive and increasing politicised areas of children and disability. Of course, we all have a natural tendency towards prejudice (Cecchin et al., 1994) by which I refer to how we use our own repertoire of familiar stories to understand the world. Concerning culture, this tendency is often referred to as ethnocentrism and it frequently leads us to intuitively tend to begin by perceiving other cultural practices as usually falling somehow short of our own so that the views of others are instinctually judged by the standards of our own culture. Kessing (1981, p. 69) described ethnocentrism and the means to begin to challenge it as follows:

"To view other people's way of life in terms of our own cultural glasses is called ethnocentrism. Becoming conscious of, and analytical about, our own glasses is a painful business..... Although we can never take our glasses off to find out what the world is 'really like', or try looking through anyone else's without our's

on as well, we can at least learn a good deal about our own prescription. With some mental effort we can begin to become conscious of the codes which lie hidden beneath our everyday behaviour”.

As I have described already in this thesis, I believe it is through practising reflexively that experts might become personally ‘conscious of the codes’ as reflexivity emphasises recognising the cultural, historical and social relational influences of our own and others theories and understandings so as to bring these forth and thereby to permit a more open dialogue either with oneself and/or with others. A reflexive stance entails seeking multiple perspectives as a means to sustain and enrich dialogue and to recognise the implicit workings of our own cultural norms. This not only is likely to provide a means for the practitioner to learn about these differences themselves, but also may help to demonstrate that the practitioner has respect for the different views of others and thereby further help to support the ongoing conversation between the expert, their colleagues and the families involved.

Although my own personal experiences within northern Namibia led to a crucial reframing and questioning of my understanding of the affects of cultural and of alternative conceptual viewpoints, particularly in relation to disability and child care, much of what I observed and thought was in the realm of personal opinion. More recently I have therefore been encouraged to read that others have shared similar experiences relating to their efforts to understanding the complex pattern of factors that can operate in developing societies and which inevitably influence the course and outcomes of programmes. As Christine Miles’ account of her work in Pakistan clearly illustrated:

“I had anticipated the need for some cultural adaptation in developing special education in another country, but before going to Pakistan I had thought of this in terms of adapting the list of specific skills taught in school, to be more culturally appropriate, while remaining within the broad agenda of aims and curriculum that I had practised in Britain... Yet I found that throughout my years in Pakistan I was grappling with new perceptions of cultural differences relating to education, children and disability” (Miles, C. 1991, p. 203).

Miles is describing what I too experienced, that adapting materials so that they are ‘more culturally appropriate’ is woefully insufficient when practising in a cross-cultural context. Rather this calls for the beginning of the process of a much more profound



reflexive examination of one's own cultural-bound beliefs, values and worldviews, and an active and equitable engagement with others.

### **5.3. The Value Of Ensuring That Portage Programmes Are Culturally Sensitive And Conceptually Relevant**

In Chapter IV I described how I believed professionals, especially those working in cross-cultural contexts, needed to consider how to develop more reflexive and collaborative work practices. I argued that this was necessary so as to encourage the mutual emerging of narratives derived from the exploratory conversational process with colleagues about their role together with the direction and purpose of change. An important aspect of this shared exploration and co-constructing inevitably calls for appreciating both our own and others cultural perspectives, an appreciation which much of the literature regarding Portage and special educational needs issues generally appears to sadly lack.

As I have suggested, given that programmes are likely to be significantly influenced by cultural beliefs, in the first instance I believe that there are therefore important *practical* reasons for why experts should give greater consideration to cultural issues. Western experts developing Portage programmes in other cultures will find that indigenous ideas and beliefs prove particularly resilient to their attempts to change them, if this is their intention, and that any acceptance of Western notions may be limited and superficial at best. For example, Devlieger (1995), cited examples such as the development of a medical rehabilitation programme in East Kasai, Zaire. He argued that in order to assist children with physical disabilities successfully, orthopaedic work alone was insufficient and that what was required was to address the whole cultural context in which the children lived using local support and working closely with families. He also stressed the need to recognise that in many parts of Africa, disability is not simply perceived as an individual abnormality but as a disruption in the family as a whole and that effective services needed to take this into account.

Questions of adult motivation and understanding related to cultural issues were also evident in the study by Mull and Mull (1988) who reported how the different notions of morbidity and cultural health concerns among rural Pakistani mothers who failed to take

childhood diarrhoea as seriously as health professionals. They suggested that this was because the mothers perceived the diarrhoea as occurring frequently among their children and knew that for most episodes it did not lead to death even without oral rehydration therapy (ORT). Consequently, even when the government went to the considerable expense of distributing ORT packets free, the mothers frequently did not use them as they believed they were not necessary.

Guthrie and Guthrie (1982), also demonstrated how in the Philippines educational programmes which were designed to support and encourage breast feeding and supplementary feeding needed to take indigenous belief systems into account. However, they remained frustrated by the fact that:

“Cultural factors such as learned helplessness, a reluctance to compare the growth of babies, alternative explanations for ill health, and a limited concept of prevention imposed alternative contingencies on the mothers to limit the effectiveness of a program designed to teach and support improved dietary practices” (p. 624).

Terms such as ‘learned helplessness’, ‘reluctance’ and ‘limited’ carry a very negative construction of the mothers’ culturally intuitive response to a Western model of intervention and to my understanding indicated a failure on the part of the experts themselves to consider the wider issues which affected the adults’ motivation towards the presenting Western medical intervention.

Indeed, failure on the part of the expert to respond to and respect alternative world views is likely to prove not only detrimental to the practical development of support programmes such as Portage by leading to poorly sustained or ineffectual programmes, but may have wider implications. These include discovering that Programmes may even work towards undermining local societies and systems (Miles, 1989) or that they potentially prove damaging to relationships with local colleagues in the longer term through creating dissonance (Edgerton, 1981) between the professionals involved and the community members whom they intend to assist similar to the ‘perceptual gaps’ mentioned by Leach (1991).

The practical ‘success’ of Portage programmes in cross-cultural contexts are likely therefore to depend upon the degree to which experts themselves value the need to



develop their own understanding of the local culture and to take account of how local colleagues and the families involved with the programme see the world. As Momm and Konig (1989, quoted in Devlieger, 1995, p. 94) argued, cultural understandings and local beliefs, “have to be understood before implementing any kind of community-based rehabilitation”. Groce (1990), similarly recognised the importance that a knowledge of traditional community folk belief systems represented and also cited this as a key component to the success of any rehabilitation programme. Likewise, Marfo (1996, p. 71), suggested that:

“The success of international efforts to address the problems associated with disability in the Third World will depend - at least in part - on how well those engaged in such efforts at different levels understand and appreciate the contexts in which they offer their expertise and advice”.

However, my concern with all of these studies which rightly recognise the practical importance of recognising and valuing traditional cultures is that they still tend to portray the role of the expert as one which primarily involves adapting Western ideas and programmes to match the local cultural context. There is little sense of how the expert and local people might additionally co-construct new ways of understanding from a merging of different ways of seeing and understanding the world. Moreover, the studies tend to imply a duality between traditional cultures and the modern, Western culture. Inevitably, as I have described above, all cultures are in the process of transition, and in those countries in which Western influences are particularly significant then cultures might be said to exist on a continuum along the route from the more traditional to the more modern. I do not wish to convey a simple linear process of change in employing the image of a continuum, as obviously change is far more complex. Nor do I wish to suggest that the modern, Western view occupies one pole of the continuum, or that there is an inevitable cultural Darwinism in which all cultures are shifting inextricably towards a more progressive and West position. However, cultures should be viewed as enactive and always changing.

Also I do not believe that questions about cultural issues should simply be understood in terms of the practical technicalities of Portage programme development as much of the literature implies. Rather, there are also *ethical* responsibilities and *educational* reasons for considering cultural issues. Understanding and appreciating cultural diversity may

also represent a valuable spur for fostering reflexive learning and expert praxis such as through reminding the expert of the plurality of understandings and meanings that others attach to child, disability and other related concepts. It is also likely to assist in the process of co-constructing that I mentioned in Chapter IV rather than leading to an assumption that other cultures will necessarily be unilaterally assimilated into the Western worldview and belief system. Understanding the diversity and legitimacy of other cultural perspectives must be the first step in the process of fostering inclusive reciprocal relationships in the process of change.

With the proliferation of Western inspired and funded international programmes such as Portage, Western experts are operating at a time when Western beliefs are powerfully influential to the degree that threats of cultural imperialism are very real. As such, being aware of and respecting the diversity of cultural understandings is likely to assist the expert in acknowledging the constructed nature of that which they themselves had previously seen as ‘natural’ and ‘taken-for-granted’ in their own cultural worldviews. Without this realisation, it is likely that the Portage expert risks contributing to a further undermining of the legitimacy and authority of non-Western cultural beliefs and suppressing alternative ‘voices’.

Additionally, failure to consider local cultural practices and solutions risks undermining educational opportunities to learn potentially valuable alternative approaches for use elsewhere. Miles (1990), for instance described examples within Pakistan where families had devised their own appropriate solutions to meeting their disabled children’s needs. Miles claimed that:

“Nobody had told these women that their skills are appropriate for early intervention and rehabilitation. How easily (and how often it happens) they could have been taught to despise their own knowledge and to make half-hearted steps towards learning techniques from a Western manual!” (p. 291).

Serpell (1988a, p. 23) also suggested that:

“rather than assuming the need to import wholesale a specialised system which was developed elsewhere, the basic parameters of local patterns of child care and socialisation should be examined for their strengths and weaknesses in relation to the special needs of disabled children”.



Dasen and Super (1988), also conveyed a more positive view of traditional solutions to health problems and emphasised the potential value in seeking out and learning from successful traditional practices. For example, in relation to overcoming malnutrition they argued that since malnutrition was not uniformly distributed across families it follows that concentrating research on those families who managed to cope well might help to identify successful and culturally familiar practices which might also be shared from one section of the population to another and thereby avoid the need to implement programmes based upon imported foreign ideas.

#### **5.4. Considering Points Of Cultural Difference And Diversity**

##### **5.4.1. Portage As A Cultural Phenomenon**

As I have described in Chapter I, the Portage Programme is historically a product of the United States education system specifically that of the 1970's and of which it has largely retained, albeit generally unacknowledged, certain core cultural assumptions. I have also suggested that Portage, with its strong behavioural and psychology research derived ideas, such as those of precision teaching and structured problem-solving, is an archetypal modernist programme, essentially reductionist and as it is allied with the modern, normalising narrative, also therefore potentially culturally coercive in its practical implications. Indeed, perhaps it is the modernist foundations of Portage which account for the general absence of any substantial references to issues of cultural diversity or any attempt to make explicit the assumptions upon which Portage rests within the Portage literature.

Rather, the scientific narratives in which Portage is frequently embedded imply a certainty that many of the concepts and assumptions that it relies upon to describe and understand itself by, related to learning, development, progress, improvement, etc., are a matter of authoritative statements of empirically derived fact to be readily taken at face value and thereby universally applicable. Again, in confusing fact with meaning, little room is therefore given within the Portage literature to appreciating how even supposedly objective facts may also be significantly and differentially understood and given various meanings to by others.

Although there is not a great deal of literature which questions the complex cultural underpinnings of the Portage programme, previously, within the review of the Portage literature I did describe and discuss how both Bardsley and Perkins (1985), and O'Toole (1991) in particular, had identified a series of what they considered to be prerequisite 'skills' and beliefs and which they claimed were likely to have important implications for the involvement of parents in Portage. While these authors did not explicitly frame these 'skills' in terms of questions of cultural diversity, these questions about whether these skills were present or not, at least seemed to be essentially concerned with, and to recognise, the potential alternative cultural beliefs and worldviews regarding child development held by the carers of children within the studies. However, in general, a reflexive scrutiny of the Portage literature and materials reveals a much wider wealth of Western cultural assumptions, particularly including those related to children and disability, which I will refer to below.

Initially I believe it is worth reflecting upon the implicit assumptions regarding the actual involvement of experts themselves. Of course, ultimately a programme designed to enhance parenting skills such as Portage, presumes a legitimacy of the implementing professional's position, one which is able to privilege power, knowledge and authority. Within the West and particularly within the United States such a presumption has clearly been part of the mainstream, culturally accepted worldview certainly during the period when Portage first emerged. As Schön (1991, p. 3) himself acknowledged in reference to American society since the beginning of the 20<sup>th</sup> Century, there has been a rapid growth in the professionalisation of society such that, "The professions have become essential to the very functioning of our society".

Within the West such a position frequently authorises professional entry into the private sphere of family life whether through invitation in the case of families seeking expert assistance or alternatively in the guise as an agent of the state in accordance with monitoring or implementing national policies. In the latter case this is often in relation to government sanctioned preferred ways of thinking and being which form part of the dominant cultural value-system, such as those related to child welfare issues.

Consequently, for the Western educational professional, culturally accustomed to a society significantly shaped by governmentality, it may be very difficult to recognise that



within other cultures and countries governments have historically played a far less influential role in how local people generally organise and understand their personal affairs. Within northern Namibia for example, the impression I eventually gained of the local culture was that it was primarily the family which traditionally acted as the main authority, and that the previous feudal system, traditionally based upon a network of local headmen, while having historically some influence had been effectively undermined by many years of conflict and occupation.

So within Namibia it also seemed that the relationship between individuals and the government was, presumably for historical and cultural reasons, very different than that to which I was accustomed in the West. Additionally, while during my stay newly independent Namibia had swiftly drafted a host of social welfare legislation related to children, it was clear that this effectively had little impact upon people's family lives certainly within more remote rural areas where the centrality of the family and local culture represented the main authority. As such, I had to remain mindful that the involvement of a professional, aside from the fact that he was also a stranger and someone from another culture, in the very private affairs of families was all highly unusual for local peoples and that I could make no assumptions about my role in terms of my authority to be there, moral or otherwise that I might have done in my own culture. I think that this tension between the expectations of Western experts regarding the assumed legitimacy of their role and embodied in the assumptions of programmes such as Portage, and that of local people, is likely to become much more acute and will raise further awkward ethical questions regarding expert intervention. This growing hegemony of Western cultural assumptions internationally may therefore have serious implications for the relationships between families and professionals.

Turning to consider other general assumptions which are usually overlooked within the Portage literature and within the Portage curriculum specifically, I have also become aware that there is a pervasive message that 'successful' child development is signified by the dominant Western cultural values of independence, individualism, personal achievement, self-determination, separation, self-expression and assertiveness. While this configuration of core values may not be of any great issue within the West, with Portage being increasingly exported to other countries and cultures these cultural assumptions are likely to prove problematic to the relationship between families and

professionals. As I shall continue to describe below in reference to children and disability, in many non-Western countries and cultures these very values may represent an anathema and conflict with local moral and religious values and this intercultural conflict is also likely to be exacerbated by the largely normative epistemology and universal assumptions of the Portage model regarding issues such as children, child development and disability.

#### **5.4.2. Cultural Variations In Understanding Children, Childhood And Child-Rearing Practices**

While working within Namibia perhaps the greatest source of conflict with my own cultural and Western conceptual background was acknowledging the sometimes very different quality of relationship to the one that I was familiar with that appeared to exist locally between some adults and their children. I noted for example, that in general family life the needs of children did not always assume precedence over the needs of adults to the same degree that we believe to be the norm in Western families. There seemed to have been a different pattern in the quantity and quality of the interactions between adults and young children, with local Namibian families appearing less child focused in their concerns than is usually considered to be the norm within the West. Not that children in northern Namibia seemed to be valued less, but rather they appeared to be valued differently from the model of child rearing to which I had been accustomed.

For example, during our regular visits to rural homesteads we would often find very young children left either alone within traditional homesteads, or children as young as five or six years being expected to care for even younger children for extended periods while the family's adults were away from the home visiting, working in the fields or on some other task which took them away from the home. Children in many families were daily expected to put the requirements of the family home first with such activities as fetching water, cooking meals and tending cattle or similar important tasks usually taking precedence over going to school. Typically and traditionally, children and adults ate separately with the adults eating first and, at least in terms of traditional beliefs if not always in practice, having the best and most food available to them. I was also regularly struck by what appeared to me to be the matter-of-fact manner in which adults sent their sometimes very young sons and daughters off to stay, often with the expectation of separation for several years, with geographically distant elderly relatives or as part of



‘namesake adoption’. These and similar experiences all stood as reminders to me that local Namibia families had different understandings and expectations of ‘childhood’, if indeed childhood was locally a recognised stage of ‘personhood’ at all or at least to the same extent to which we typically hold it to mean within mainstream Western society. In essence I believe that this different view of children within northern Namibia probably reflected part of a much wider cultural understanding of humanity and ‘personhood’, one that in many ways was alien to my own understanding. Moreover, this experience certainly provided me with the impetus to research into and question my own Western values and beliefs regarding children and childhood as the writing of this chapter demonstrates.

Through research I began to appreciate how, within the West, childhood as a distinct period of human development is itself a fairly recent concept and one which has important implications for further cultural understandings. That is, once childhood was conceptually constructed and reified, Western researchers naturally turned their attention to investigating the ‘processes’ and ‘conditions’ of childhood (James and Prout, 1990). Indeed, Western societies have witnessed a remarkable growth of interest in children and childhood issues since the beginning of the 20<sup>th</sup> Century. Evolving social policy and legislative developments have become increasingly child focused and child related issues are frequently at the forefront of public and media interest and concern. Consequently, within the West a popular image of children has emerged that currently tends to depict childhood as a distinct period of individual human development which is characterised by innocence and vulnerability and which should be nurtured, ideally by a set of prescribed and authorised parenting behaviours which have been identified as the aspired to ideal by Western sociological and psychological research (Kessen, 1979).

Within the popular current discourses of the West childhood is now understood as being determined primarily by biological and psychological facts, as a reified phenomenon rather than as a socially constructed concept framed by historically contingent, cultural and societal values. Westerners rarely question whether the discursive boundaries of their present concept of childhood are shared by other cultures or if the concept of childhood is acknowledged at all as witnessed by outrage within the Western media over stories of child-labour and child-soldiers. Although social constructionism together with the growing body of cross-cultural evidence has begun to offer a broader range of

alternative and diverse perspectives to the orthodox Western discourse, at present within the psychological, educational and rehabilitation literature the prevalent and pervasive assumptions and judgements about children continue to reflect dominant Western cultural conceptualisations. Moreover, it is this Western conceptual orthodoxy which continues to be 'exported' to non-Western cultures such as through growing international legislation and associated projects and programmes similar to Portage. However, more recently some concerns have begun to be raised by a few that this Western model of childhood is contributing towards the development of an often contextually inappropriate and ubiquitous worldview of childhood (e.g. Scheper-Hughes, 1987a; Boyden, 1990; Miles and Miles, 1993).

The comparatively very recent interest in cross-cultural child related issues may also explain the relative dearth of research in this field. For example, Cassidy (1987) commented on how little interest was devoted to the conditions experienced by children internationally prior to the 1930's despite an awareness of comparatively high mortality rates among infants which were well known by clinicians working in colonial settings. She also argued that it was not until the end of the 19<sup>th</sup> Century that Western society witnessed the popularisation of the conception of childhood as a vulnerable phase of life requiring protection and the corresponding evolution of the myth of 'maternal sentiment'. According to Cassidy, this emerging myth was significant in influencing both Western parenting ideals and more recently the inherent stereotypical assumptions contained within Western derived child related legislation.

Likewise, the majority of child advice handbooks and other related literature largely contain implicit assumptions which stem from a Western cultural conceptualisation of children and family life. Indeed, occasionally the promotion of Western notions regarding childhood, child psychological theories and child rearing practices are highly explicit. Moreover, the attempts of some programmes to introduce and encourage Western child rearing practices in the local indigenous community also seemed to have been conducted without any apparent investigation into the potentially damaging effects upon that culture or to understand the possible wide range of reasons for the prevailing nature and quality of the relationship between local children and their primary carers.



Grotberg and Bardin, (1989, p. 142) for example, working in the Sudan operated a programme of which one stated aim included addressing whether an early stimulation programme conducted by parents could change child rearing practices, “and, indirectly, the culture from less traditional into more modern”. The study appeared to suggest that both Western ‘modern’ child rearing practices and the Western culture were inherently superior to the local indigenous culture and associated traditional practices and to my understanding also implied that the authors held a cultural-deficit theory regarding the local cultural practices. In the research report traditional cultures were stereotyped as exhibiting, “male dominance, lower education of women, minimal labour participation by women, and limited legal rights for women” (p. 143). Moreover, the study claimed that in cultures which exhibited child-rearing practices which emphasised early training in obedience while discouraging children from asking questions, that this adversely affected children’s intellectual development. Grotberg and Bardin (1989, p. 141) even argued that, “There is evidence that creative thinking in children is positively associated with more permissive; i.e. more modern, child rearing patterns”.

Alternatively, even where the importance of recognising and valuing more traditional and non-Western child-rearing practices have been acknowledged by Western researchers and experts, there has been a tendency to judge these to be either positive or negative in comparison with current scientific thinking and practices, as if these were the ultimate standards of certainty against which other beliefs and practices should be judged. The UNICEF report (1993) for example suggested that practitioners might use strategies to build upon or manipulate local child-rearing practices through the use of ‘reinforcers’ and ‘ways to motivate’ others to adopt practice more in line with scientific practices and to identify those to be ‘discouraged’. The reference to motivators and reinforcers within the report is all very behavioural and I believe again gives the impression of how experts can manipulate rather than collaboratively evolve change within other cultures. Indeed, the whole tone of the report was one which implied that experts were those who practised their skills *on* others, for their clients’ own good, with a privileging of concerns regarding the outcomes of practice rather than a concern with processes of change. Within the report there was an absence of any sense of the spirit of mutual collaboration, or of the importance of co-constructive change in which new, reciprocal learning, that which might even challenge scientific certainty, might emerge.

Clearly, to reduce the risk of such presumptuous Western cultural stereotyping within expert practice, there would appear to be an urgent need, on the part of Western practitioners, to firstly acknowledge the importance of the self-reflexive deconstructing of their own beliefs and ideas about children and childhood. Secondly, experts might be encouraged to recognise that other cultures and communities may hold different but equally valid understandings about children. Through these means I believe that as Western educational practitioners we might avoid, or at least make more explicit, our potential neo-colonial impositions and begin to question the normalising model of childhood and parenting latent in much of the Portage literature.

### *Different Cultural Patterns And Attitudes To Child-Rearing*

There is a growing albeit relative small body of literature related to studies which have recognised and commented on the wide range of child rearing practices noted within non-Western and traditional cultures where, as I found in Namibia, children are apparently valued differently in terms of the patterning and timing in which 'love' is offered from contemporary Western practice (Rohner, 1975; Korbin, 1981; LeVine and LeVine, 1981; Miles, 1992). Other examples of different patterns of child-parent interactions and child-rearing practices have been noted in Benin (Sargent, 1982), northern Brazil (Scheper-Hughes, 1987a), Paraguay (Vega, 1985, quoted in Cassidy 1987), India (Miller, 1987), and Belize (Cassidy, 1987). In fact, ethnographic research into variations in child rearing practices has been conducted since the beginning of the century although largely as part of wider ethnographic categorisations of different cultures rather than directly as an interest in patterns of child-care.

As I have commented upon above, despite these and similar studies, the acknowledgement of sometimes very marked differences in the nature of adult-child interactions from the Western ideal does not appear to have significantly influenced the mainstream policies and practices aimed at families and children promoted by international agencies such as the United Nations or World Health Organisation (Ingstad and Reynolds-Whyte, 1995; Kalyanpur, 1996). Accordingly, a Western and rather sentimentalised concept of childhood (Kessen, 1979) continues to dominate the heavily child focused approach advocated by many educational, health and nutritional development efforts internationally (Cassidy, 1987). In general while cross-cultural



studies have served to illuminate the sheer diversity in child-rearing practices in relation to cultural beliefs, this still remains an area of study which currently lacks an extensive body of research and so Western child-rearing literature and assumptions within programmes such as Portage continue to portray child-rearing as largely a culture-free process with universal, normalising standards of what constitutes 'good' parenting.

In my research of the relevant literature I have noted that of the early studies into the diverse range of parent-child interactions and child-rearing practices most appear to have focused particularly upon correlations between differing styles of parenting and the economic circumstances in which families lived and interest in this relationship continues. Furthermore, within the literature it is often implied that varying economic circumstances not only influence child rearing practices generally but, of relevance to Portage, also effect the specific circumstances of children with disabilities.

For example, Mallory (1996, p. 5), explored the relationship between cultural influences, economic conditions and child-rearing practices claiming that, "traditional responses to economic conditions influence heavily the way in which children are raised and how their relative value is perceived". Mallory (1996) also contrasted how within contemporary Western societies the economic relationship between parents and their children is usually characterised by a flow of resources from parents to children but that within non-Western countries children can play a greater role in generating economic resources so that these resources may even flow from the children to their parents. Indeed, the significance of children's contributions to family finances, it is claimed, had similarly existed within Western European families up until the early 20<sup>th</sup> Century when various social welfare legislation led to, "an increase in the cost of childhood, causing a sudden large increment in the dependency of children upon their parents" (Heward, 1993, p 237).

Moreover, Mallory (1996, p. 5) argued that different economic conditions frequently influenced the goals and responses of parents to their children's developmental needs and that, "these variations become even more clearer when a child is born with or acquires a developmental disability".

Also related to available material resources, Cassidy (1987) reported how among poorer families in Belize it was usual for economically productive adults to receive much more and better quality food than small children because the latter were seen by their parents as “doing nothing” (p. 295), that is, not contributing to the family resources and therefore ‘logically’ not as hungry. This difference in attitude towards children related to the economic conditions of families was also noted by Scheper-Hughes (1987a) in a study of poor families in northern Brazil. She argued that in the “Third World” context:

“so often characterised by a high pressure demography of untamed fertility and high mortality, individuals themselves approach reproduction and parenting with a range of sentiments and practices rather different from our own. Parents in much of the so called developing world (like parents in early modern Europe) understand a baby’s life to be a provisional and undependable thing ...child death may be interpreted less as a tragedy than as a misfortune, one to be accepted with equanimity and resignation as an unalterable fact of human existence” (p. 2).

Scheper-Hughes (1987a) therefore also criticised the universal assumptions regarding motherhood held and promoted by the West. She commented on the current Western reproductive strategy of giving birth to few infants and investing heavily in each one as a relatively recent phenomenon noting that:

“it does not reflect the “maternal thinking” of a great many women living in the Third World today where an alternative strategy holds....this strategy requires a very different conception of maternal thinking, and just as surely elicits different kinds of maternal attachments, feelings and sentiments. Since this reproductive strategy is characteristic of much of the world’s poorer population today, it would seem that some revision of maternal bonding/maternal thinking as a universal human script is in order today” (p. 202).

Indeed, perhaps one of the most controversial areas for cross-cultural studies into child-rearing practices and parental behaviour has centred upon this concept of ‘maternal bonding’. The concept seemed to have emerged from the attentions of Western developmental psychologists researching into early infant-mother interactions particularly during the 1950’s (e.g. Bowlby, 1952). Since that time the concept of maternal-bonding as an important and ‘natural’ element in child-parent interaction has been further refined to suggest that there was a particularly ‘sensitive period’ for maternal attachment, and that as such this should be recognised and reflected in clinical practice (Klaus and Kennell, 1975). The influence and reification of this concept became widespread within the West as deVries, (1987) described, “almost as a crusade,



“bonding” became a primary orientation in obstetric and paediatric practice, as well as in the culture at large” (p. 110). Furthermore, the concept can also be seen to have influenced a considerable body of international opinion world-wide (e.g. World Health Organisation, 1977).

The concept of maternal bonding, like that of childhood generally, continues to permeate many Western theories related to the interaction between children and their parents (Boyden, 1990) although together with associated concepts such as “maternal instinct” and “mother-love” it too has also been criticised as both culturally and historical specific (Scheper-Hughes, 1987b) and inaccurate (Badinter, 1981; deVries, 1987). More recently, ethnographic research studies have reported examples of maternal behaviour which appear to suggest parental behaviour which is contrary to the notion of maternal bonding. For example, deVries (1987, p. 122) provocatively suggested that:

“the evidence seriously questions the common assumptions in Western culture that a mother’s response to her new-born is one of instant attachment and inevitable rapture”.

Furthermore, deVries contended that at times of particularly difficult economic or personal circumstances or when the child presented with a disability “the historical, contemporary, and ethnographic evidence suggests that neonaticide may be an adaptive maternal strategy under certain conditions” (p. 123).

Scheper-Hughes (1987a, 1987b, 1992) also noted a degree of what she assumed to be maternal detachment or indifference towards passive or inactive babies which were judged by their mothers to be too vulnerable to survive. Such mothers were reported to have expressed anxieties for the possibility of having to care for permanently disabled children due to the demands, social and emotional, that the children were believed to place upon the family. Also, according to Sargent (1982), the Bariba women of Benin traditionally, for reasons other than economic, preferred the cultural custom of solitary delivery so as to allow them, it is claimed, to evaluate their infants for disabilities and to kill them if necessary. As such, the Bariba women appeared to share similar maternal behaviours to the women in Scheper-Hughes’s study. Sargent (1982) also claimed that Bariba mothers would refrain from developing a strong attachment to their children and the children would not receive a formal name until they have reached an age when they

sprouted teeth as it was only then that the child's chances of survival were considered to be more assured. Furthermore, 'maternal estrangement' (Scheper-Hughes, 1987b) may not only be associated with adverse economic conditions or even related to a child's perceived special needs as Western researchers have tried to rationalise, but might also simply reflect the traditional maternal strategy found within certain cultures.

Inevitably, attempts to frame and explain the diverse range of parental behaviours and attitudes towards children and those with disabilities as responses primarily to economic conditions are likely to prove simplistic and stereotypical as religious, social and other cultural issues are all likely to complicate any causal explanations. For example, Miller (1987), also noted very different maternal behaviour and child-rearing practices in women living in rural northern India from that purported by the Western maternal bonding theory. Miller recorded how the cultural preference for mothers to give birth to a boy was associated with girls receiving less care and food than their brothers, again for wider cultural rather than economic reasons.

LeVine and LeVine (1981, pp. 43-44) also reported, focusing upon the traditional maternal strategy of the East African Gusii ethnic group, that:

"Our Gusii data show that after infants are three months old the amount of eye contact permitted by their mothers declines rapidly and after seven months is rare; when it does occur, it is fleeting. While infants sometimes continue well past their first birthday to attempt to engage their mother's in reciprocal play, particularly while nursing, their mothers tend to ignore these efforts....for a mother to engage a small child, let alone an infant, in "conversation" would, to these women, seem eccentric behaviour.....Conversely, the practice of speaking to a child only to give him a command, far from constituting neglect or even cruelty, seems to be entirely appropriate behaviour".

LeVine and LeVine conjectured that the behaviour of Gusii mothers may have been related not only to the mothers need to devote time to domestic chores but a fundamental belief that it simply was not appropriate to a maternal role to engage children otherwise and that this maternal behaviour represented a form of, "institutional avoidance between successive generations" (p. 44). Certainly within Namibia it was not unusual to find that some mothers, particularly those in larger families where there were several older children available to care for the younger ones, to seemingly take only a passing interest in the direct daily management and care of their children. In many other cases we never



met the children's mothers, especially if they were younger women who were living in some other region of the country, and who would pass each of their children, once weaned, into the care of elderly relatives.

Holden and Ritchie (1988) also commented upon how many adults from non-Western cultures kept verbal interactions with their children to a minimal level and that when it did take place this tended to be directly instructional and short and did not encourage a response from the child. Again, such different cultural practices and realities concerning how families view children and understand 'childhood' as well as how they behave towards their children can potentially present challenges to Western professionals particular those whose own culture and values may construct concepts that, "properly loved children, regardless of social class, belonged in a domesticated, non-productive world" (Zeilizer, 1985, quoted in Boyden, 1990, p. 186).

Some traditional child-rearing practices therefore directly challenge both the widely held beliefs concerning maternal behaviour within the West and some of the ubiquitous conceptions of children and parenting that are presently propagated by Western dominated international institutions and programmes like Portage. In such cultures where mothers traditionally seek to disengage themselves from their infants after a few months, questions might also be raised about the value of using a programme such as Portage especially when it is understood primarily as an educational and instructional programme. Bromwich (1979) for example, suggested that enhancing children's developmental skills was likely to prove ineffective when parent-child reciprocity and attachment were lacking.

Clearly, attempting to introduce the original Portage teaching behaviours and teaching practice within some cultural and family contexts could be highly inappropriate, at least initially, if mothers are assumed to be the primary teacher of the child from who a certain level of engagement and motivation is required to ensure regular and precise teaching. Such expectations may directly challenge the traditional family concepts of childhood and child-rearing practices or set too high expectations for how families respond not only to children generally but especially to those with disabilities.

Moreover, Western professionals who non-reflexively proselytise Western special education practices such as those which rely heavily on parental/adult and particularly maternal involvement, may risk becoming disillusioned with the apparent lack of commitment of the children's families especially in relation to children with disabilities. In turn this may result in the generation of negative and unhelpful stereotypical views about local families and traditional practices such as those voiced by Grotberg and Bardin (1989) cited above and as noted in the international Portage literature reviewed in Chapter I. Also, there may be very real and unforeseen hazards through indiscriminately advocating Western child rearing practices (Curran, 1984). Ritchie and Ritchie (1981, p. 187) for example, reported how Maori mothers among migrant families to New Zealand presented:

“an extreme form, almost a parody, of the European child-rearing style. They attempted to toilet train earlier, used more rigid feeding schedules, were less warm, more punitive, and harsher in their judgements of their children's behaviour. We attributed this phenomena to social forces: on the one hand the surrounding pressures to conform to an alien environment, including the Polynesians' desire as a minority to protect themselves from criticism, and on the other their imitation of what they perceived to be the major features of the European pattern”.

I have discussed how the concept of childhood has relatively recent roots in the culture of the West and that experts should not necessarily assume that others from different cultures with whom they work and apply their professional skills will either share the same cultural understanding of childhood or even recognise the concept at all. Likewise, how children are viewed and the practices by which they are reared also varies considerably across different cultures whether this diversity is conceptualised as caused by economic circumstances or due to other traditional cultural customs and practices. Consequently, regarding cultural understandings of children, childhood and child-rearing practice, some of the literature seems to concur with my own experiences in Africa that I described in Chapter III, in that it implies that the introduction of educational and rehabilitation programmes directed to help families and children, such as Portage, as a cross-cultural endeavour needs to be very carefully and reflexively considered if such programmes are to harmonise with local cultural needs, avoid neo-colonial imposition and prove beneficial to all.



As I have described, the original Portage approach in particular is predicated on assumptions that parents will usually be keen to help and directly teach their children and it assumes that parents will be able to regularly set aside time during the day in order to teach. Furthermore, Portage particularly aims to promote successful parental styles which often centre upon encouraging parents to engage in dialogue with their children. However, such assumptions may conflict with indigenous parental styles. For example, Mbise and Kysela (1994, p. 279), rather like the LeVine's and LeVine's (1981) Gusii study mentioned above, in a study of home-based teaching in Tanzania noted that:

“In the majority of Tanzania tribes, children have no freedom to engage in prolonged, intensive, dyadic play with adults. The adults assume that children know little and, therefore, they should listen more than talk. They are expected to speak to adults in response to specific questions and instructions. The consequence is that children tend to be limited in elaborate verbal experiences until they reach adolescence”.

Likewise, Super and Harkenss (1986, 1987) reported how in certain East African families adults believed that children learned language skills from talking to other children more than from their mothers and they found that the frequency of mother's speech to their infants was far lower than might be expected in American families. Consequently, as I have also described in Chapter III regarding the Engela Portage Programme, I believe that for Portage to be relevant to local families, the aims of the Programme in some circumstances may need to be radically re-conceptualised, through dialogue and negotiation with local people, so that it is able to accommodate the varying amounts of time and different levels of commitment that the children's families are able to devote to working with their children.

Reflecting upon the Engela Portage Programme I am also aware that in many respects developing the Programme in the manner that we did could have been viewed as contrary to an acknowledgement of cultural relativism in that the Programme appeared to have directly challenged some, but not all, of the traditional child-rearing practices locally. That is, many of the local families who took part in the Engela Portage Programme seemed to illustrate some of the parental behaviours noted in the studies I have referred to above which were characterised as illustrating an ‘emotional distancing’ between the adults and their children in their interactions. This of course was precisely what we targeted for change in the Engela Portage Programme. As I mentioned in

Chapter III, as many of the children with disabilities who we encountered locally and who took part in the Engela Portage Programme appeared on our first arrival to spend considerable periods of the day alone, we came to understand that it was the actual nature and quality of the relationship between the child and their family that was important to change. This primary focus on social interaction rather than a particular concern regarding the educational outcomes of the child become most important to us. Nevertheless, I feel fairly confident that the fact that the families of the children were able to usefully accommodate the Engela Portage Programme and found it supportive, as the evaluation implied, serves to demonstrate two important points.

Firstly, it highlights the danger of cultural stereotyping that some ethnographic studies may unwittingly promote. Had I read any ethnographic literature related to the local ethnic group who lived within northern Namibia (there were no specific references that I could find before my arrival and few that I have encountered since returning to the United Kingdom) I might not have even considered Portage as a viable programme, possibly concluding it as irrelevant to the cultural known practices of local families. However, as I stated above, culture is not an immutable phenomenon that determines the likely response of groups of people but might more helpfully be understood as a dynamic concept.

At the individual level the families who took part in the Engela Portage Programme were therefore not 'locked into' cultural patterns of behaviour but were able to both appreciate and accommodate into their lives some of the routines and expectations of the Engela Portage Programme. In this way the families might have been said to have been similar to the Asian families in Bardsley and Perkins (1985) study who ostensibly did not have the alleged prerequisite skills required for Portage but nonetheless were well able to participate very effectively in the programme. So, while as I have stated earlier in this chapter I believe it is important for experts to have an awareness of other cultural practices, this should be with the view of encouraging the practitioner to think about the diversity of beliefs and worldviews, rather than leading them to believe that through their research of the ethnographic literature they have come to 'know' about any particular family or culture. With regard to the Engela Portage Programme and the families involved, it seemed that in the event, the families did not find the suggested changes to their pattern of interpersonal relations with their children with disabilities in conflict



with their ways of life or cultural belief. Rather, it seemed that they simply had not considered relating to their children in the manner that we encouraged by introducing the Engela Portage Programme.

Secondly, I think that it demonstrates that the Portage Programme, when expert practice is reflectively and reflexively constructive, can be developed in a sufficiently flexible and sensitive manner so as to meet the cultural and individual needs of local families. Concerning the Engela Portage Programme, what seemed to have emerged from the enactive process was both some change in the families' cultural practices and understanding regarding their children and also a reciprocal change in the Engela Portage Programme. That is, through the development of enactive relationships that emerged between all involved, a similar change also occurred in my own and my colleagues' understanding of Portage and our professional practices; again demonstrating the potential of change through exchange. I believe that this would have not have been so had I and my colleagues understood Portage simply in technical terms, as a programme to be implemented and the materials 'tweaked' so that they became more culturally relevant or if we had unduly harried the children's families to follow too prescriptive recommendations and so match ours, but not their own, values and expectations.

### *Child Developmental Trajectories*

With 'childhood' emerging within the 20<sup>th</sup> Century in the West as a conceptually distinct period of individual human development with its own unique range of socio-political and psychological discourses (Sarason, 1996), modernist research also turned its attention towards understanding the new phenomena. Consequently, various theories of child development have been posited especially to describe the growth of children's abilities and intelligence (e.g. Piaget, 1954; Bruner, 1964).

Typical of the modernist paradigm, studies have also tended to understand the course of child development in objective, decontextualised terms, in which its crucial essence once 'discovered' has been assumed to apply universally to children and, "with the usual cost of uniformed dogma, the commitment to the isolatable child has occasionally led child psychology into exaggerations and significant omissions" (Kessen, 1979, p. 819). However, as Bronfenbrenner (1979, p. 19, quoted in Super and Harkness, 1986, p. 550) criticised:

“much of developmental psychology, as it now exists, is the science of the strange behaviour of children in strange situations with strange adults for the briefest possible periods of time”.

Moreover, the universal assumptions of laboratory derived understandings of child development have been used to fabricate, as with the notion of parenting, a normalising pattern of development against which individual children with ‘deficient’ progress can be identified and so treated. Such an understanding also seems to be part of the core cultural assumptions of the Portage model as the Portage Checklist conveys, even if this is not the intention, an idealised and normative pattern of child development.

Yet despite concerns regarding the validity of child development theories many studies continue to use experimentally designed tests such as the Griffiths Mental Development Scales assessment which are based upon Western, universal theories of child developmental stages and trajectories. Indeed, the most influential current theories of child development have all been formulated within the West (Agiobu-Kemmer, 1984). Consequently, Western development programmes such as Portage which focus upon education and children with disabilities also largely rest upon Western cultural assumptions of children and child development. Again, as with other cultural assumptions implicit within the Portage literature, the assumed ubiquity of these psychological resources and the conceptual stages of child development may potentially lead to difficulties and conflicts when Western derived advice and policies are applied to other cultures where, as I have described above, beliefs and ideas concerning children and childhood may be very different.

The very idea that there may not be such clearly defined developmental routes is rarely questioned by the bulk of Western child-care literature so that the current Western orthodoxy relating to child development remains characterised by concerns with documenting the consistent patterns of individual activity over time, through a hypothesised series of developmental stages. Consequently, this view of development has achieved a degree of certainty in the Western experts’ mindset so that it now seems impossible to imagine an alternative or different reality in which to conceive the changes in children’s growth. Within the West, child development theories have in particular largely been dominated by the highly influential work of Jean Piaget (James and Prout,



1990). The Piagetian model continues to influence Western theories, such as through highlighting the significance of developmental markers from which to gauge children's progress. This concept of child development also emphasises the notion of natural growth from an early point of biological immaturity and dependence through to independent adulthood, which is characterised as the attainment of the final stage of rationality and logical thought. However, the metaphors of evolution and growth that the Piagetian theory implies have the tendency to obscure the possibility of cultural, social or environmental influences on shaping, at least to any significant degree, a child's development (Richards and Light, 1986).

James and Prout (1990, p. 23) also suggested that despite the growing criticism of the orthodoxy of this model it has been maintained and been resistant to change because it has "been extraordinarily productive in the creation of knowledge about childhood and any new developments will build upon this foundation". Consequently, the Piagetian model has, perhaps not surprisingly, also formed the basis of many international efforts to assist children's development as witnessed for example by the World Health Organisation Manual (Helander, et al., 1983), and Thorburn's, Introduction to Developmental Disabilities (Thorburn, 1988b). Also, the World Bank's, Consultative Group on Early Childhood Care and Development (World Bank, 2001a) asserted that:

"It is important for adults to use *methods* that fit with the child's growth pattern, not only in the cognitive area, but also in the affective, perceptual and motor areas. Activities should provide the child with a developmentally appropriate challenge" and that "Development proceeds in predictable steps" (no page numbers, emphasis added).

Again, these texts portray a fundamental belief in a normalised, universal understanding of child development as also demonstrated by the claim of the World Bank's Consultative Group on Early Childhood Care and Development that:

"The Early Child Development approach is based on the *proven fact* that young children respond best when caregivers use specific techniques designed to encourage and stimulate progress to the next level of development" (World Bank, 2001b, no page number, emphasis added).

Yet there is a small but growing quantity of literature which indicates that there are a number of significant areas, such as the age at which children should be taught and the

understanding of what ‘development’ might achieve, where alternative cultural understandings may both challenge and contradict the assumptions of more orthodox Western cultural ideas of child development. For example, many Asian societies emphasise the significance of a child’s experience only after s/he has reached the ‘age of reason’ at approximately 6 or 7 years (Miles, 1992). Similarly, Ritchie and Ritchie (1981) commented upon how in traditional Polynesian families young children below the age of 2 years of age were not even considered trainable. As such, beliefs related to the age at which children are ready for training may show wide variations across different societies globally.

Western inspired development trajectories, such as the Portage Curriculum, also largely reflect the fundamental conceptual belief in child development as primarily a process in which the early attainment of individually exercised independence, self-reliance and autonomy by the child is the esteemed and indeed the universally ‘natural’ end goal (Schweder, 1991). With such implicit cultural assumptions, being reliant upon others or dependent is viewed as not normal. However, the Western cultural belief in individualism and personal independence is not necessarily the case in many other cultures where families may conceive of and aspire to different developmental futures for their children, where rather than independence, social responsibility is judged to be the ultimate criterion for adequate development. As such, families may have a different understanding of the order of development and the priority of specific skills that the child acquires in the course of their development. For example, as Miles (1992, p. 245) noted:

“To Pakistani’s many Western practices with infants and toddlers appear cruel and strange, e.g. making small children fit adult timetables, pushing them towards early self-help skills, isolating them at night. Pakistan sees little equivalent of the Western, middle-class, child-rearing aim to produce individuals who will increasingly exercise their own life choices and preferences as they become independent from their families”.

Schweder (1991) also proposed that while the Western preoccupation with the individual and independence reflected an egocentric concern, that in contrast within the East sociocentric views often prevail. Schweder (1991) also recognised the tendency in the East for societies not to separate or distinguish the individual from the social context, and that in many non-Western cultures a person’s ‘value’ is not determined by their



individual abilities and accomplishments but rather in terms of their relationships with others. Consequently, in such societies Western understandings of children as needing to strive towards and eventually attaining greater degrees of free will and individualism are not valued and may even be counter-cultural. Also, Serpell et al. (1993, p. 11) reflected that:

“Whereas Western theories of socialisation have tended to place a great deal of emphasis on the promotion of autonomy, African parents tend, by contrast, to be more preoccupied with the cultivation of social responsibility and nurturance”.

Similarly, Woodhead (1990) warned that Western educational packages which aim to promote independence in children may be an abhorrent to many families from traditional cultures. Super and Harkness (1986, 1987) also noted how within East African cultures parents were primarily concerned with training their children towards obedience and responsibility. Ingstad (1995) similarly reported how Tswana society privileged the collective over the individual. Likewise, Goerdt (1984, p. 88) in a study of child development and physical disability in Barbados also noted how local parents would strive to ensure that their children achieved both a degree of independence but also ‘connectedness’ and that they believed that while:

“one should demonstrate autonomy, one must not be too independent of others...for the unity of the group depends not only on the contribution of each member, but also each member’s willingness to accept help from others”.

Awareness of research studies such as these has caused me to rethink and question some of my own cherished professional beliefs about child development and have helped me to begin to acknowledge the potential limitations and possible inappropriateness of conventional, Western and Piagetian based child development theories when considered in relation to some non-Western, sociocentric cultures. To my understanding such research again demonstrates the need for a greater awareness and a wider consideration of the relativity of how notions of child development inherent within the Portage literature and materials are variously socially constructed within different cultures. To this end Agiobu-Kemmer, (1984) posited an alternative theory of child development which she felt had greater applicability to African societies where, she claimed, affective factors were of more importance than cognitive for the development of intelligence during infancy. For example, she quoted the phenomenon of ‘African infant precocity’

(Lusk and Lewis, 1972) as evidence for the importance of the social environment of children and particularly the physical and social proximity of the child-maternal relationship in some African cultures as influencing early intellectual development.

Likewise, Katz and Kilner (1987) also described an alternative, 'transformational model' of child development from their work in Fiji which contrasts sharply with many aspects of Piagetian child development theory. The transformational model visualises child development to include a spiritual dimension, along a route that is neither unidirectional nor the basis of permanent developmental gains, with a flexibility in the sequence of development and which clearly links the child (or adult) in a socio-cultural context. Katz and Kilner (1987) claimed that this model of child and adult development reflected and was more relevant to Fijian spiritual and community cultural concerns and understanding. Nsamenang (1992a) also described an alternative view of child development among the Nso ethnic group of West Africa by which child development is apparently conceptualised as following nine successive cycles, where spiritual and patterns of social participation mark a child's level of maturation rather than any notion of biological maturity.

Similarly, Sturmey and Crisp (1986) also reflected that although the Portage Curriculum presented skills in a developmental format which suggested that they were all of equal value, that to parents and to children certain skills might be more meaningful than others and that measuring the outcome by the numbers of goals achieved assumed, implicitly and wrongly, that all these skills were of equally significance to families. The literature on the cultural diversity of child development I have outlined above would imply that this is likely to be particularly so when Portage is developed within cross-cultural contexts, again rendering a simple quantitative evaluation of teaching outcomes questionable.

Indeed, more recently social constructional views have also questioned the idea of developmental stages as central to the schedules of growth encapsulated within the vegetation metaphor of modern developmental psychology. Gergen (1982) for example highlighted the danger of this kind of science by analogy and of assuming that there are any universal standards by which humans can measure their functioning. Gergen stated that the whole idea of a 'normal' child, or even whole lifespan trajectory, is flawed and



he emphasised how development is highly variable both in respect to psychological functioning and behaviour. According to Gergen (1982, p. 161), "A virtual infinity of developmental forms seems possible, and which particular form emerges may depend on a confluence of particulars, the existence of which is fundamentally unsystematic". Likewise, Mittler (1981, p. 108), acknowledged that, "norms differ greatly from community to community and that it would therefore not be appropriate to apply any standard yardstick of development, whether developed in the West or East".

In terms of the wider influences of culture cutting across the usually assumed universal and hierarchical model of child development, Super and Harkness (1986) introduced the concept of the 'developmental niche' to explain the diversity in children's developmental courses in different cultures. They conceptualised children's development as a function of three mutually interacting components. These were: different physical and social settings; the local customs of child care; and the beliefs or the 'psychology' of the children's care givers. Super and Harkness (1986, 1987) also contrasted how the difference in settings between Western children and those in East Africa led to differences in previously taken-for-granted, universal behaviours such as sleep patterns, the speed at which the children were able to develop the skills of sitting up independently, and children's social interest in associating with members of their own gender. They associated these differences to the children's settings of their daily lives which the authors argued determined the activities the children were able or expected to engage in which in turn determined the pattern of social interactions in which the children could participate. Similarly, the authors recognised that at a physical level the preponderance of, for example, diseases and parasites as well as the nutritiousness of the children's diet also influenced the pace of the children's development.

In their study, Super and Harkness (1986) additionally identified a range of child care customs which they primarily explained as associated with the physical demands of the child's environment but which also differentially affected the development of American and East African children. For example, the more frequent opportunities for the African infants to sit and walk which was, "practised on a daily basis months before these skills were fully acquired by the baby" (Super and Harkness, 1986, p. 556) led to their precocity in these skills compared to American infants. This research therefore also seems to question the World Bank's Consultative Group on Early Childhood Care and

Development assertion, I cited above, about the need for families to use ‘methods’ which match a child’s growth patterns, as clearly it should not be assumed that there are universal patterns of growth, or universally relevant ‘methods’.

As the third feature of the developmental niche, Super and Harkness (1986, p. 557) also reported that the beliefs and values of child-carers influenced the structure of children’s development “through the meaning it invests in universal behaviours and processes” and so determines the response and concerns of the care-giver. The authors suggested that, for example, the beliefs of children’s mothers in East Africa might be observed in their approach to children’s language socialisation with, as I have also mentioned above, adults seeing the child’s language development in terms of developing their obedience and responsibility rather than the child’s individuality and verbal expressiveness as is considered crucial by most Western developmental trajectories. Super and Harkness’s (1986) understanding of the developmental niche therefore appears to serve not only as a useful metaphor for highlighting the significant complexities of the multiple interactions between the development courses of children and the wider cultural context in which such developments takes place, but also as a helpful counter to a Western child development hegemony.

#### **5.4.3. Cultural Variations In Understanding ‘Disability’ Generally**

Prior to my arrival within Namibia I had been intrigued by questions about how local people might variously understand concepts related to disability and special educational needs; what their usual responses to children with these problems were; how such children were cared for; etc. I realised that the answers to such questions would have important consequences for how my professional role unfolded and for the nature of any programme that might be developed locally. Within Chapter III, I have detailed how during my period of stay within Namibia I came to understand the wide and various views of local people regarding some of these questions. I have also already described how this experience spurred me into researching into both the cultural grounding of my own conceptualisations regarding disability and into other non-Western cultural conceptualisations of disability and to consider what potential implications that these different understandings might have for programmes such as Portage and for expert practice.



Clearly, human societies have long witnessed the phenomena of individuals who exhibit differing levels of physical, sensory and mental functioning. That disability has been something that all societies have had to contend with has been suggested by Scheer and Groce (1988) who surveyed the physical evidence from early human history. However, despite such evidence implying the historical and demographic ubiquity of what in the West is understood as 'disability', different cultural groups might be expected to differ, sometimes radically, in their interpretation of the concept. That is, different cultures and societies may not necessarily acknowledge variations in levels of human functioning and behaviour as related in anyway or as falling within a general 'disability' taxonomy and there may be some wide variations in the levels of tolerance before 'difference' is recognised as significant and meaningful. Consequently, I have come to understand how for Western experts involved in cross-cultural Portage programmes it would seem to be a crucial responsibility for them to recognise the potential cultural plurality in conceptualisations of disability. Furthermore, this would appear to also call for Western practitioners to be vigilant and receptive not only to any traditional beliefs associated with various disabilities but also to any indigenous patterns of behaviour towards people with disabilities and any local knowledge which may exist.

As with the various constructions discussed earlier in this chapter regarding children and childhood, prevalent views and practices within the general literature related to disability also appear to be currently dominated internationally by Western conceptualisations. This may be accounted for by the large discrepancy between the considerable body of research focusing upon disability issues within the West and the paucity of interest in other non-Western conceptualisations. It appears that only belatedly has research - anthropological, sociological and psychological - begun to turn its attention to disability within developing countries (Ingstad and Reynolds-White, 1995). Consequently, in terms of significant practice issues related to supporting those with disability in other cultures, Mallory (1996, p. 2) bemoaned the continued, "gap between policy rhetoric and the reality of program implementation". Indeed, Groce and Scheer, (1990) claimed that this lack of research might be evidence for a general pattern of ethnocentrism among many Western researchers regarding disability issues. Moreover, it seems that where research has been conducted related to disability in other cultures, this has largely focused upon a restricted range of disability issues associated with leprosy, mental health and mental retardation (Edgerton, 1968, 1984).

*Problems With Arriving At A Definition Of Disability*

With the research that has considered different cultural perspectives of disability indicating that there is a vast complexity of understanding towards disability and varying constructions across different cultural settings, attempts to reach an internationally agreed definition of disability, by international organisations such as the World Health Organisation, have run into substantial difficulties. Indeed, Mittler (1981) claimed that understandings and attitudes towards children with disability in rural parts of the world can even vary from village to village a few miles apart. Nevertheless, the International Year of Disabled Persons 1981 and the subsequent United Nations declaration of the Decade for Disabled Persons in 1983 in particular raised the question for those wishing to monitor and respond to the phenomena internationally as to how disability might somehow be universally defined cross-culturally. The need to forge a universally recognised definition of disability has in part probably stemmed from the United Nations desire to estimate the magnitude of ‘the problem’ globally and to also monitor the effects of various rehabilitative programme initiatives.

The difficulty with so many variable definitions for disability was illustrated by the United Nation’s decision to revise its initial estimate of the prevalence of disability which quoted a global figure equating to 10 percent of the world’s population (World Health Organisation, 1976). This figure was later revised to between 6 or 7 percent of the world’s population when it was recognised that the earlier definition of disability had included disability rates for diseases, malnutrition, genetic causes, etc. (Helander, 1992). Indeed, in a review of several international disability surveys, Helander (1992) reported that estimates of disability varied across fifty-five different countries ranging from 0.2 percent to 21 percent. This in turn led Helander to call for the urgent establishment of “standardising disability definitions and survey technology” (p. 23).

The often quoted World Health Organisation’s (1980) understanding of disability actually describes three interrelated concepts: impairment, disability and handicap. Impairment, as defined by the World Health Organisation (1980) is, “any loss or abnormality of psychological, physiological, or anatomical structure or function” (p. 27). Whereas disability is defined as, “any restriction or lack (resulting from an impairment) of ability to perform an activity in the manner, or in the range considered normal for a human being” (p. 28). Finally, the World Health Organisation defined a handicap as, “a



disadvantage for a given individual, resulting from an impairment or disability, that limits or prevents the fulfilment of a role that is normal (depending on age, sex and social and cultural factors) for that individual” (p. 29). While the World Health Organisation have attempted to frame the definition of disability and handicap within a socio-cultural context, implying that disability is related to the activities expected of the individual, this definition continues to primarily emphasise a biomedical understanding of disability. Consequently, the World Health Organisation’s definition of disability as a biological fact does not always readily concur with significant and wider social understandings and implications regarding disability which are prevalent in many other countries of the world (Peters, 1993).

For example, Nukunya, et al. (1975) also described how disability and sickness in a traditional African context was much more of a social phenomena and often associated with earlier family dealings, ancestors and ‘disturbed’ social relations. Nsamenang (1992b) also argued that there is a tendency for Westerners to underestimate the important and pervasive role of kinship and network of extended family and alliances in developing countries such as in Africa in supporting people with disabilities. Further studies in which local cultures view disability significantly in wider social terms have been noted elsewhere (Walker, 1986; Scheer and Groce, 1988; Serpell, 1988b; Groce and Scheer, 1990; Miles, 1992; Ingstad and Reynolds-Whyte, 1995), especially with regard to disabilities where a medical aetiology is frequently less clear-cut as is the case in terms of learning disabilities and where social and cultural considerations rather than physiological variables are more significant. Similarly, Goerdt (1984) also reported how within Barbados, disability was not only conceptualised in terms of physical or intellectual helplessness but crucially in terms of limitations on social interaction, or a failure to ‘connect’ with others.

Additionally, there are also wider implications for the Western emphasis on a physical conceptualisation of disability, an understanding which focuses upon improving the function of body parts and improving individual physical competence. As similarly described above in relation to the Western conceptualisations of child development, Ingstad and Reynolds-Whyte (1995) argued that within the West the historical construction of disability and its maintenance through current discourse has been grounded upon a fundamental assumption of a drive towards equality and with the

pursuit of independence and personal autonomy by individuals. Moreover, according to Ingstad and Reynolds-Whyte, historical circumstances have led to disability becoming shaped by:

“a framework of state, legal, economic, and biomedical institutions....disability is a medical condition for which technical expertise (educational, psychological, social) is the answer” (p. 10).

In contrast, they claimed that within developing countries:

“this kind of institutional infrastructure exists only to a very limited degree, disability as a concept and identity is not an explicit cultural construct. The meaning of impairment must be understood in terms of cosmology and values and purposes of social life” (p. 10).

Consequently, Ingstad and Reynolds-Whyte (1995) additionally argued that differing notions of personhood and humanity need to be considered when disability issues are raised and that what is significant is an awareness that:

“the cultural conceptualisation of humanity is variable; the anomalies that may be seen as inhuman differ greatly from one society to another, and they do not correspond directly to biomedical definitions of impairment” (p. 11).

Indeed, Helander (1992) provided several examples of how ‘disability’ during international surveys had been understood in much broader terms than the narrower physiology conceptualisation of the West. He described, for example, how in Somalia:

“a women had been identified as having a disability because of strange behaviour...the reason for considering her disabled...her father had starting arranging a marriage for her....she had refused the marriage, and after this episode she had been considered a “fool” (p. 11).

This emphasis upon the social significance and meaning of disability or rather of ‘difference’, as contributing towards a person’s degree of disability are clearly absent from the World Health Organisation’s understanding. Within their own socio-cultural contexts these social criteria for disability are seen as just as valid as those of physical difference and they concur with the prevailing local culturally bound views of normal and abnormal personhood. Given the wide diversity in how the concept of disability might be understood, it also seems reasonable to question whether any single,



generalised concept of disability, a concept which historically is itself a relatively recent Western medical taxonomy, should be conceptually applied and assumed relevant to all cultures.

Consequently, Helander (1992) suggested that, at least initially, the World Health Organisation should accept an internationally relatively simpler definition of a disabled person as, “a person who in his/her society is regarded as disabled, because of a difference in appearance and/or behaviour” (p. 10), and that individuals may find themselves in a ‘state of disablement’ if some aspect of their person conflicts with the local socially constructed notions of ‘normality’. However, this definition seems to be so broad that it raises the question of whether internationally it would prove useful for statistical purposes. Whatever, Helander’s proposed definition of disability does not appear to have replaced the original 1980 World Health Organisation’s version which continues to be referred to in much of their relevant literature.

However, Helander’s support for a more culturally relative definition of disability does again underline the pervasive significance with which socially constructed cultural factors influence how variations among humans, including behavioural as well as physiological factors, lead to very different social constructions regarding disability. Aside from the complications that this may have on the application of any Western imposed programme which aims to support the ‘disabled’, it also again calls upon those experts working cross-culturally to question their own culturally bound assumptions as well as potentially challenging professionals to acknowledge a wider, perhaps very strange, range of different conceptualisations.

More generally, the risk is that the World Health Organisation and other international organisations concerned with disability issues, by ignoring the cultural bound understanding of disability, will also understate the importance of wider socio-psychological concerns, those which link symbolically the range of meanings that exist for the person described as disabled and the wider community around them. Consequently, rehabilitative and special educational programmes such as Portage which embrace the current international definition of disability and which also fail to reflexively question their values and beliefs are likely to remain too technically focused.

### *A Western Concept of Disability*

Given the present pervasive influence of Western understandings of disability I believe that it might be helpful at this stage to consider these in greater detail. As I have described, the Western model of disability, that which appears to have heavily influenced the World Health Organisation's definition, has largely tended both historically and currently to view disability diagnostically as an individual, within-person phenomenon. As with the Western idea of childhood, this medical model of disability seems to derive from a modernist perspective. No doubt it is this modernist understanding of disability which downplays the subjective and cultural foundations of the West's own concept of disability and so perhaps also renders it difficult for those who embrace it to sometimes adequately conceive of, and to respect, the different understandings of individual difference held by other cultures.

In terms of Portage's global expansion for example, this lack of reflexivity may potentially also represent a further source of misunderstanding and conflict when Western trained Portage professionals communicate cross-culturally with both local colleagues and the families of children who may hold alternative culture-bound world views. Indeed, with disability framed primarily in medical and physical terms this may have both invited and provided the grounds for medical type interventions in order to help the individual 'affected' either recover from or adjust to their disability (Oliver 1990). As Groce and Scheer (1990, p. V) argued:

“the biomedical characterisation of disability as a diseased state has allowed research on disability to begin with the assumption that the person with a disability is a temporary anomaly in an otherwise non-disabled population and that his or her disability is something that the individual should valiantly try to ignore, deny or overcome...it is not surprising that the individual's character and social role are seen as some sort of addendum to his or her disability”.

The implications of a narrow biological and medical understanding of disability are also evident in the conventional ideas of rehabilitation, which is traditionally understood to be the provenance of experts and to require esoteric, curative programmes and professional routines which are relatively uniform globally with few considerations for national, regional or local anomalies and differences (Helander, 1992).



Yet, even within the West more recently there has been a growing awareness of disability as a socio-cultural phenomenon and the wider and important social consequences of disability and how these might present greater challenges to people with disabilities than their impairment alone would suggest (Finkelstein, 1980; Oliver, 1984, Hahn, 1985; Oliver, 1990; Abberley, 1992; Zarb, 1992). This realisation of the shortcomings of the biomedical perspective may have also led to the beginning of a shift in Western understanding of the problems of children with disabilities and an acknowledgement of the limitations of the conventional, within-person view of causation (Johansson, 1991).

However, although the medical model has been widely criticised and its limitations explored (Hegarty 1989; Helander, 1992; Stubbs, 1993) it continues to effect a very considerable influence on rehabilitation practices and it still plays a significant role shaping the conceptualisations of programmes, such as Portage, which are operating within developing countries. It can therefore be expected that as the Western concept of disability continues to be exported globally that there are likely to be clashes with alternative ethical systems such as Hindu and Buddhist beliefs on the relation of this life to the next life and for example with indigenous African beliefs related to the causes of ill-health. These alternative culturally embedded worldviews may also likely have a direct and significant influence on how the Western construct of disability is both received and understood and may influence the likelihood as well as the perceived need and style of any family support programmes related to disability and special educational needs.

### *Stereotypical Views Of Indigenous Attitudes Towards People With Disabilities*

The dearth of literature relating to a recognition of wider cultural constructions and local practices surrounding the concept of disability within non-Western communities, may partially explain the rather stereotypical notions which Western observers have typically attributed to attitudes towards the people with disabilities in other cultures. That is, the bulk of early studies in this field have tended to adopt a rather Eurocentric perspective and have frequently implied dismal conditions for people with disabilities. Moreover, Groce and Scheer (1990) even suggested that the lack of research into these issues was also commonly justified on the general assumption that within developing countries and cultures people with disabilities were unable or not allowed to live beyond childhood.

Similarly, Nicholls (1996, p. 26) commenting on research related to African views towards disability complained that overall:

“there has been an observable tendency to reduce African ideas about disability to a few hackneyed scenarios whereby disability is seen either as a result of witchcraft...or as a form of divine retribution”.

Ingstad (1990) claimed that this negative image describing the plight of the disabled in developing countries may even have also represented a ruse by Western charities to help raise funds and interest in their causes and programmes targeted towards assisting the disabled. Scheer and Groce (1988) also argued that the relatively few studies concerning disability had typically assumed that disability within traditional cultures automatically caused an individual to be marginalised within their social group. They later also suggested that such negative assumptions underlined the ethnocentric bias which, “unfortunately has been replicated in the scientific literature” (Groce and Scheer, 1990, p. V).

Certainly, much of the earlier literature related to the conditions of children with disabilities in developing countries that I encountered in my research frequently portrayed a generally negative image suggesting high levels of neonaticide and predominantly unfavourable living conditions for children with disabilities. For example, Goffman (1963) suggested that internationally most societies viewed disability as a social stigma and considered people with disabilities as being deviant from normal society.

Dickeman (1975) also claimed that the high frequency of infanticide related to children with disabilities within developing countries correlated with the reported lower incidence of particular malformations than would otherwise be expected within the general adult population as a whole. Whiting (1977) in a study of 99 traditional societies from the Human Relation Area Files also noted that there were recorded incidents of infanticide within 84 of these societies. Kisanji (1993), listed what he claimed to be the six main focal points around which he believed folk belief systems evolved, which included: the cause of disability; decision whether the individual should live or die; family reaction to the living child; educability and trainability of the child; the range of possible vocational



options locally; and participation in community life. Most of the examples that Kisanji gave again portrayed negative perceptions and consequences for people with disabilities.

Furthermore, as Ingstad, (1990) and Nicholls (1996) noted, many studies regarding non-Western understandings of disability also appear to imply causal beliefs associated with 'evil' witchcraft and cosmology. Serpell, et al. (1993, p. 3), in reviewing the literature on 'mental retardation' in Africa also asserted that:

“As was the case in Europe until the last few decades, most lay people in Africa in the 1980's still tend to attribute the condition to supernatural causes and view it with a mixture of anxiety and repugnance”.

However, there are studies which convey a different picture regarding how people with disabilities are treated and understood in other cultures and the ethnographic evidence may not be quite so conclusively negative as some authors suggest. For example, in contrast to Whiting's (1977) study mentioned above, Weiss (1985, quoted in Scheer and Groce, 1988) in a review of 13 societies which were also detailed within the Human Resources Area Files from Africa, Asia, Oceania and the Americas, reported only 5 cases where infanticide was apparently practised on children with disabilities. In a similar manner in which I also heard a parent describe children with disabilities within northern Namibia, Ingstad (1990) reported how in neighbouring Botswana the birth of a child with a disability was sometimes seen as a sign of God's trust in the family to take care of the special child.

Nicholls (1996) also reported how among the Yoruba ethnic group of Nigeria, people with disabilities were seen as special people with special relationships with certain deities. Similarly, Talle (1995) in Kenya also noted, a 'caring attitude' of Maasai parents towards their children with disabilities. Nicolaisen (1995, p. 45) in Sarawak, also reported how within the community that she worked, “each of the mentally retarded persons that I have known well lived comfortably with and were well treated as part of their families”.

As I became aware from my own experiences within Namibia, it is most likely that any particular society will display a wide range of attitudes towards children and adults with

disabilities and that any attempts to generalise too broadly based upon presumed cultural patterns of beliefs and behaviour is likely to lead to unhelpful assumptions.

While working with families within northern Namibia, as I have described in Chapter III, I was able to witness a wide range of conditions and circumstances of children with disabilities which seemed to reflect the diverse attitudes of their families and the local community towards them. These varied from children with Down's syndrome who played an active role in family and community life, such as their regularly taking part in church congregations and assisting with family chores under supervision, to children with severe learning difficulties playing among and socialising with customers at local shops, through to other children with disabilities who were effectively hidden from and unknown to the local community. Walker's (1986, p. 246) experiences also seemed to concur with my own, claiming that:

"In spite of the heavy influence of tradition and culture on the formation of attitudes towards illness and disability in Africa, it can not be assumed that all or the majority of these attitudes are negative or harmful. Attitude studies conducted by the author in West Africa revealed on the one hand considerable variation in attitude towards the handicapped and on the other considerable positive and/or supportive approaches concerning the needs of the disabled".

Clearly, attempting to interpret how the meaning of 'disability' varies culturally is a complex endeavour as so many unique and individual circumstances are likely to shape the views that a particular culture, community, family or individual may have towards children with disabilities. To reiterate so as to stress an important point, while I believe it is very helpful towards encouraging reflexivity for Portage experts to have a wide awareness of the diverse range of alternative understandings regarding the concept of disability, this should not lead to them assuming that they 'know' about how the people they work with relate to children with disability and how disability is understood locally.

Moreover, 'second-hand' information gained from the literature or other sources regarding cultural beliefs and practice is unlikely to offer sufficient grounds on which experts might make predications or judgements about how others will respond to Portage, as such information by its very essentialist nature cannot accommodate the potential possibilities for change in others. Inevitably therefore, it is at the local and individual family level, that those working within the field of disability, such as Portage



professionals, will ultimately need to acquire an understanding of what disability as a local cultural construct means as well as what it means to those individuals deemed as disabled.

#### **5.4.4. Cultural Variations In Understanding ‘Mental Retardation’**

Given that Portage is particularly associated with supporting families who have children with cognitive or intellectual disabilities, I have been especially interested in researching into how this concept is variously socially constructed in different cultures and considering potential cross-cultural implications for Portage expert practice.

Throughout my research I have noted that the international research literature continues to largely adopt the derogatory term ‘mental retardation’, again possibly reflecting the underlying normalising basis of this concept. Attempts have however been made to introduce terms which have less negative connotations. For example, Mittler and Serpell (1985) advocated the use of the term ‘intellectual disability’ and Serpell (1988b) later also suggested the use of the various designations to refer to the categories or levels of, ‘moderate’, ‘severe’ or ‘profound’ intellectual disability. However, more recently Serpell et al. (1993) again seemed to favour the term ‘mental retardation’. Helander (1992), in relation to the World Health Organisation’s CBR programme, appeared to also encounter difficulties in agreeing upon an appropriate term and he variously employed the labels ‘people who have difficulty learning’, ‘mental disability’ and ‘mental retardation’ when referring to the ‘condition’.

While my own cultural and professional background has led me to personally favour the use of the more relative, but nonetheless also normative derived term, ‘severe learning difficulties’, throughout this section I will generally refer to ‘mental retardation’ as it is the development and current significance of this Western construction that I wish to consider. Also, despite the alternatives mentioned above ‘mental retardation’ continues to enjoy popular currency in much of the international literature. However, it must be acknowledged that this term, as with those suggested above, both fails to adequately reflect the heterogeneous nature of the children who are assigned this label and to my understanding it continues to reflect Western categorical thinking. Furthermore, the term is used to encompass those whose abilities may vary from the few who are profoundly affected and who often require a high level of medical supervision and support throughout their lives, through to others who are so mildly ‘impaired’ that they might not

be singled out as different in their cognitive functioning by many communities (e.g. Kromberg et al., 1996). Indeed, Serpell et al. (1993, p. 11) also suggested that, “in the rural African settings we have described, there may be no use of the concept of mild mental retardation”.

The concept of mental retardation is certainly a very prominent Western psychological, medical, educational and social conceptualisation for which a vast body of research literature has accumulated. Therefore, it could be reasonably expected that mental retardation might best illustrate some of the differences and difficulties associated with cross-cultural interpretations related to disability, special education and rehabilitation and in many ways what in the West we know as mental retardation probably represents the disability which is most open to varying socio-cultural constructions.

The largely culture-bound nature of the concept however has not discouraged many Western authorities from attempting to frame it primarily in categorical terms based upon supposedly objective cognitive and developmental tests, which have had the effect of further reifying the concept and so presume that ‘it’ can be measured objectively. No doubt as with the concept of disability generally that I have described above, this desire to pathologise mental retardation is again related to the positivistic leanings of Western societies so that mental retardation has also tended to be understood within a medical and normalising framework believed to be fundamentally universally applicable regardless of cultures. Consequently, many international studies into mental retardation continue to interpret the concept as a matter of fact rather than one of meaning (e.g. Yoder and Kibria, 1987; Kromberg et al., 1996) even in relation to milder disabilities where there are no accompanying physical markers.

Also, many Western researchers and practitioners concerned with mental retardation continue to frequently overlook or ignore the important functional role of culture in the defining of the concept. As such, while extensive studies have focused upon mental retardation, including those into its causes and the means by which it might be ameliorated, there is a general lack of research and anthropological interest in mental retardation in non-Western cultures although calls for further research into mental retardation in other cultures continue (Belmont, 1981; Edgerton, 1984; Serpell, et al., 1993).



Indeed Edgerton (1984) has even argued that socio-cultural research into mental retardation in other cultures could provide a further valuable educational opportunity to illuminate and inform Western practice within this field and similar views have been reiterated by Manion and Bersani (1987), Miles (1992) and Serpell et al. (1993). However, to date the international focus upon mental retardation remains largely dominated by Western conceptualisations with only scant consideration for alternative viewpoints despite, as Miles (1992, p. 235) asserted:

“Large parts of the world have no exposure to Western ideas in this specialised field, and maintain substantially different concepts, which appear to them both logical and self-consistent”.

### *Definitions Of 'Mental Retardation'*

As with the concept of disability generally, the significant role that socio-cultural factors play in determining the nature of 'mental retardation' is perhaps best exemplified by the enormous difficulties which have been encountered by attempts to define this Western psycho-biological 'condition' in all but the most profoundly affected individuals. The current dominant Western description of mental retardation usually rests upon the description of two key criteria, both of which as Serpell (1988b) argued are widely recognised to be concepts directly influenced themselves by cultural perspectives (Edgerton, 1984; McConachie, 1995). The first of these is the concept of intelligence, as measured by IQ test scores and which continues to form the central diagnostic criterion for determining mental retardation and its various levels. The other concept is that of development or adaptive behaviour, again as I mentioned above regarding child development, also a highly subjective notion.

Both of these concepts, intelligence and adaptive development, are employed within the World Health Organisation's definition which emphasises; “intellectual functioning that is significantly below average”; and “a marked impairment in the ability of the individual to adapt to the daily demands of the social environment” (World Health Organisation, 1980). Manion and Bersani (1987, p. 236) claimed that the use of such criteria also reflected the complexity of Western societies where, “advanced technology has dictated the criterion for 'normalcy'”, and so underlined the essential social

constructed nature of the term which makes, “the concept of mental retardation subject to manipulation and interpretation”.

Edgerton (1984) offered a concise summary of Western beliefs regarding ‘mental retardation’ many of which continue to be prevalent to date. He distinguished between people with very significant difficulties who he termed ‘organically retarded’, and those with less severe and milder difficulties who he described as ‘socio-culturally retarded’. The former term refers to children and adults who are born with impairments which are frequently identified before or soon after birth and whose aetiology is generally known to medicine. The parents of these children, according to Edgerton, may stem from the whole socio-economic spectrum and the disability is not usually linked to any economic or material deprivation. Typically, these children and adults represent no more than 20 percent of the population considered to be mentally retarded and they are usually understood in normative terms to have IQ scores which fall at or below 50. However, even with such profound disabilities, although Western research may be able to identify a biological aetiology and these children may be more clearly identifiable as physically ‘different’ in most cultures, this tells us little about the meanings that are attributed towards their disability by local cultures.

In contrast, the group of children with less severe difficulties, who Edgerton described as ‘socio-culturally retarded’, may according to Edgerton represent up to 75 percent of the ‘mentally retarded’ population, and are generally understood to record IQ scores which fall between 50 and 70 points. With such milder forms of retardation there is usually no clear biomedical aetiology and the degree of disability therefore appears to be mostly determined by cultural, social and economic conditions.

While the prevalence rate of approximately 3 percent has been quoted for mental retardation generally within a typical population, others have challenged this figure as too high and suggest that a figure of 1 percent might be more accurate. Richardson (1978) for example noted, as did Mercer (1973), the phenomenon by which ‘mildly mentally retarded’ children were often noted to disappear into society once they reached school leaving age and when they were away from educational institutions which represented the only contexts in which they were considered retarded. Again,



Richardson claimed that this further illustrated the relative and highly subjective culturally determined nature of the concept of mental retardation.

Clearly, attempting to apply a Western understanding of mental retardation globally, with its roots so grounded in diverse cultural and social understandings should present substantial challenges. Yet Serpell (1988b), was hopeful that at least for the group of children that Edgerton considered as organically retarded, it would be possible to agree some trans-cultural definition on the grounds that at this most severe level of disability most impairments had an organic aetiology to help identify the children. He also argued that at very early levels of child development, the major environmental demands on a child's cognitive functioning are likely to demonstrate greater generalisation across cultures. For example, most children learn to breast feed, respond to movement across their face, etc. Consequently, Serpell suggested that it was more likely that these severely retarded children, those who could be expected to be more significantly delayed, might also be much more readily identified. As such, Serpell believed that it should be possible to evolve an international definition which could include an adaptive behavioural element which would be relevant to a child's own particular cultural context and which could reflect local values and expectations of young children.

However, the major difficulties inherent in this task were later also acknowledged by Serpell et al. (1993, p. 4) who asserted that while many African societies recognised the key dimensions underpinning the Western conception of mental retardation such as intelligence, development and social adaptation, that:

“the constellation of relations among these broad concepts differ in significant respects in small scale rural communities in Africa from the ways in which they have been conceptualised in the psychological theories and professional practices of modern Western societies”.

That is, as I have suggested above, Serpell et al. (1993) appeared to recognise that what is important is the *meaning* and signification that children with mental retardation, whether mild or severe, have for their local cultures and that this is most likely to determine how their families will respond to them. Perhaps this was well illustrated by my own experiences with the Engela Portage Programme in Namibia. As I have described in Chapter III, despite our best efforts we were never able to identify many

very young children locally under the age of two years who would have fit the Western definition of profound or severe learning difficulties or mental retardation. That these children were later brought to our attention when they were older I can only conjecture may have been due to local families understanding the different behaviours of these very young children from the behaviour of other children the same age in different terms, if indeed 'difference' was even a meaningful concept in regard to their babies' behaviour at all.

*The Cultural Significance of, and Responses to, 'Mental Retardation'*

While research into different cultural responses to children with mental retardation remains limited, most of the research appears to be related to two key questions. The first has concerned the degree to which developing societies are aware of children with mental retardation within their midst particularly those with milder forms of retardation. The second has inquired into the manner in which mental retardation is understood such as witnessed through the degree of inclusion or exclusion of those deemed to have this 'difference' or disability. As with disabilities generally, the research literature I have encountered seems to indicate a rather confused picture with some of the claims made by studies conflicting both in terms of the degree to which other cultures and non-Western societies are apparently conscious of milder forms of mental retardation and the treatment that such children and adults might typically expect from their local communities.

Edgerton (1984), argued that there existed basic assumptions about mental retardation held in the minds of Western thinkers which contributed to their distorted view of competency in preliterate societies. He suggested that researchers have typically and erroneously assumed that non-Western societies were more tolerant and accepting of people considered to be mentally retarded as researchers assumed that the, "mildly mentally retarded would be unexceptional members of their societies; only the severely retarded would be a problem and they would be killed early in life" (p. 29). However, he added that:

"The cross-cultural evidence indicates a more complex reality. Although it appears to be the case that even very mild intellectual deficits are recognised everywhere, how these people will be treated varies greatly. Some societies inflict casual cruelties and physical torture on mildly retarded people, but other



societies including many in Central Asia, India and the Middle-East, offered such persons protected and even favoured roles" (p. 29).

So while Edgerton claimed that mild differences among children and adults were detected in other cultures, the meaning of these differences locally varied considerably. Saunders (1984, p. 205) also reported how, "There was little evidence to suggest that parents failed to recognise handicapping conditions which would not have been obvious to parents in developed countries".

Miles (1992), also quoted evidence which suggested that mild levels of mental retardation were recognised in both rural and urban areas of India and that it was viewed and interpreted differently, both across different regions of the country and through different sections and levels of Indian society.

In contrast, within Africa, Serpell, et al. (1993, p. 5) implied that mild levels of retardation are not directly apparent or of concern to the population and that:

"the concept of mental retardation only has social validity in rural African subsistence economies when the degree of retardation is sufficiently severe to become conspicuous against a background of loosely defined biological sequences. Individual differences in developmental rate are easily tolerated in rural African societies where multi-aged groups are the norm both in play and in work settings".

Serpell et al. (1993, p. 3) also added that families frequently drew upon cosmological notions of cause for mental retardation and that these, "receive wider credence than biomedical, socio-cultural, or psychoeducational perspectives". My own experiences within northern Namibia tended to tally much more closely with Edgerton's suggestions, in that many parents and carers of children did appear aware when the children developed at even a mildly slower rate than their peers, although they did not necessarily show undue concern or conceptualise their children as 'retarded' in a Western sense. Parents and care-takers would often seek advice and support widely from all available sources which included local traditional healers and their local health clinics and hospitals all of which might have indicated the families' belief in a illness model of causation. However, it may also have been that the families' choice regarding the source of advice and support that they sought might have simply reflected the proximity and

availability of services and their relative costs, rather than necessarily representing a reflection of any underlying beliefs in the cause of the child's difficulties.

Miles (1992) also produced findings which do not directly concur with Serpell et al.'s (1993) study. According to Miles, the majority of respondents to a survey conducted within Pakistan indicated that they believed either health related and/or educational measures were most appropriate to preventing disability, that is, all types of disability. However, Miles also acknowledged that within the culture supernatural causes of disability were also held by some people to be the cause of disability. Additionally, Miles considered it quite possible that some of the respondents to the survey may have also been reluctant to divulge such ideas to the educated, urban professionals who collected the survey data from them.

To some extent I found that families within northern Namibia appeared to 'hedge their bets' and it was not unusual to encounter children wearing various charms which some families believed might help to alleviate the child's difficulties, but who were also seeking educational support. Also, as with children with disabilities generally, I found that within northern Namibia children with both mild and more severe learning difficulties were so variously treated by their families and people within their local communities that it would be inappropriate to generalise about how the local community viewed these children or what the typical traditional and cultural response to such children was.

### **5.5. The Need For Tentative Reflexivity When Regarding Different Cultural Understandings**

Above, I have identified some of the problems that I believe are presented when Western experts fail to adequately acknowledge, appreciate and respect the wide diversity of cultural and individual beliefs held regarding children, disability and mental retardation and the socially-constructed nature of their own conventional Western understanding of these concepts. However, I also became aware of the potential consequences of local colleagues unreflectively embracing the Western understanding of, for example, disability and its implication for rehabilitative approaches. I noted for example that within northern Namibia, the local CBR programme which strictly followed the World



Health Organisation's guidelines (Helander et al., 1983) caused some dissonance and frustration between themselves and the families they supported. This was evident in the CBR review report (ELCIN, 1992) which made some references to local beliefs, although how this information was collected was unclear and the report only focused upon negative beliefs which were felt to undermine and act as a barrier to CBR efforts.

The ELCIN report referred to the need for awareness raising to, "influence positively traditional beliefs and attitudes which reinforce negative behaviours towards disabled persons" (p. 14) although the report was not specific about what these negative beliefs were. The report dismissed the regular questions asked by parents noting that:

*"some of the parents are ruined by trivial questions as to why such a disability happened to their family. A family counselor (sic) is needed here to help the family admit without bad feelings the condition of their family member (s)" (p. 26, emphasis added).*

This example seems to vividly illustrate the potential problems of the non-reflexive and wholesale uncritical exportation of Western ideals and values. It underlines my own concerns about the development of local Portage programmes and services and the training of local staff non-reflectively and non-reflexively by Western experts, who may follow a technical Portage 'blue-print' which purveys a 'one-size-fits-all' solution to disability and special education problems. The implications in this local CBR example seemed to have been to encourage local staff to disregard or devalue their own local cultural views such as those regarding disability. Indeed, in this case, there appears to have been a conflict of interest between the Western inspired CBR initiative, the local people charged with implementing it and the interests of local families which amount to a level of dissonance which led to the views of others being judged negatively.

Interestingly, local families referred to in the ELCIN report appeared to be expressing an interest similarly noted by Devlieger (1995, p. 95) who suggested that:

*"whereas the concerns of Western societies is to improve on the lives of people with disabilities, in some African societies, such as the Songye of Zaire, the primary interest is in explaining why they are as they are... the idea of rehabilitation as a continued effort of improving and accommodating the living conditions of persons with disabilities is basically a Western idea that is foreign to Songye thought. Instead, the Songye have developed in their culture*

alternative ways and means of coping with disability. Living with the limits of the disability rather than surpassing them seems to be the most important norm”.

I also have other concerns. As I have suggested, the Western export and the globalisation of the concept of disability, potentially perpetuated by the Portage Programme, may also pose further problems such as through possibly stigmatising people who would not traditionally fall into indigenous notions of disability.

An example of this may be witnessed in a study by Kromberg et al. (1996), which looked into ‘intellectual disability’ in rural areas of South Africa in which children’s abilities were assessed again using the Griffiths Scales, a standardised assessment test I have mentioned above. Of the children tested, Kromberg et al. (1996, s. 21) reported that, “the intellectual disability was often not recognised by the mothers or the community. Most affected children were mildly disabled”. While the intentions of highlighting the children’s ‘disabilities’ to their families were no doubt benevolent, such research does risk falling into the trap acknowledged by Mercer’s (1973) report entitled, “The Six Hour Retarded Child” in which he described how some children within the USA were considered as ‘retarded’ within the school environment solely upon the basis of their IQ scores determined by standardised assessments, without regard for their sometimes exceptionally adaptive behaviours demonstrated within their own homes and local communities.

Similarly, Thorburn et al. (1991) described how in a survey of families in Jamaica there was relatively little awareness of disability within the community as understood by key informants such as nurses and midwives compared to that revealed by a Western inspired disability survey. What was not asked within the research article was why this was so or how disability was differently understood locally. Presumably those deemed to be disabled by the survey were as a consequence subsequently viewed differently by their families and community following the survey.

McConachie (1995) also explicitly questioned the use of Western standardised child development assessment tests, such as the Griffiths, not only for use with children from non-Western cultural backgrounds but also the validity of this and similar tests when working with all children with impairments. Concerns with the type of study reported by Kromberg are also echoed by Miles (1990, p. 292) who argued:



“One important way in which people in developing countries assist and integrate disabled members is by not labelling and counting people as “disabled” when they are mildly impaired. The WHO and other agencies continue trumpeting the slogan “1 in 10”, yet surveys across Asia suggest that from 2 to 4 % of the population are perceived and reported as disabled by their family and neighbours”.

Similarly, alongside stigmatising those who might otherwise not have been identified as different in their own communities, the expert who non-reflexively promotes a modernist Western concept of disability or mental retardation may also act to convince others of the legitimate and object reality of the Western view.

However, not only is there the risk that researchers and practitioners may impose their own understandings of disability upon other cultures, but I believe that researchers and practitioners who adopt a more medical understanding of disability may also be more liable to make too quick, possibly ethnocentric, value judgements about the cultural beliefs of others. In doing so they may assume that Western, modern values and beliefs are naturally more advanced and progressively superior. Such difficulties seem to be illustrated by Thorburn’s (1994b, p. 17, emphasis added) rather condemning comments that, “In many parts of the Third World, attitudes and practices towards disabled persons also reflect the superstitions and beliefs which may be a *hangover from earlier cultures*”. Thorburn, who adapted the Portage Programme for local Jamaican use, continued:

“most disabled people are a depressed, dependent, inarticulate minority...their ambitions may not even include *independence*...they begin to become self-advocates only after they have received some services...and have been brought together in groups where they can discuss with others *who have their interest at heart and want them to develop*” (p. 18, emphasis added).

Such views seem to hark back to early missionary and colonial proselytising, an image which is further reinforced by Thorburn’s illustration of the “Ten Commandments of Integrated Living” which, for example, boldly claimed that:

“1. Family Life: As a person with a disability, you should have the freedom to find a partner, have children and set up a family; you should live with your family and be part of the community” (p. 20).

While such aims may be perfectly laudable from a Western perspective in which there is a concern with attaining individual independence, they may not, as I have described above in relation to children, necessarily reflect the family and societal realities found within some indigenous cultures where alternative world views and personal aspirations may exist and which should be acknowledged.

Indeed, Mallory (1996) argued that countries with colonial and missionary backgrounds frequently continued to illustrate evidence of practice within their present education and social services with accompanying paternalism and chauvinism and the ELCIN report I quoted above may also be one further example of this. Mallory (1996) also warned that, for example, in the case of special educational programmes such as Portage which aim to serve children with disabilities that, “in some developing societies, the values of compensation and remediation may not be indigenous. If these two sets of values are not inherently compatible, the results may be social stress” (p. 7). Mallory suggested that this may be particularly so in those societies and cultures which traditionally ‘ascribed’ attributes related to a person’s family background, their gender and so forth, where these are valued more than ‘achieved’ attributes acquired through life experience such as education, economic success, etc. Miles (1996) also concurred with this view, noting in reference to many Asian cultures that ascribed attributes such as birth, caste, skin pigmentation, served to demonstrate the ‘value-inequality’ within such cultures which contrasted markedly with the ‘value-equality’ dominant in most Western societies.

Within this chapter, I have attempted to describe from my own experiences and by drawing upon the relevant literature, how cultural differences regarding the conceptual understandings of issues surrounding children and disabilities are likely to have a significant impact upon both the practice of Western educational experts and the shape of any implemented Portage programmes. The different meanings that local families attributed to children with disabilities and the various and diverse pattern of child-rearing practices and expectations, etc. will clearly all impact upon how Portage is understood to be more or less relevant in different cultures. To my understanding, cross-cultural expert involvement therefore requires that firstly Portage experts are sensitive to and curious about the range of different cultural views of others and also alert to the implicit cultural themes which influence and inform the experiences of others. This means that while it is important to develop an appreciation of the individual views of families and others



engaged with, it is also vital for experts to have a wider knowledge and appreciation of difference to inform their own reflective expert practice. It is here that general anthropological knowledge such as that I have included within this chapter, if critically read, can prove helpful provided that it is understood as just one story among others and that it does not set the expert in an elevated and 'already knowing' position.

I have specifically tried to illustrate the potential rich diversity of other cultural views regarding the concepts of childhood and disabilities as all of these might be said to be very relevant to Portage. I can also appreciate that some may argue that such a cultural relativistic stance, as I seem to be suggesting in this chapter, may potentially lead the expert into colluding with or passively condoning local cultural norms and practices which may at times be contrary to the Western espoused ethics and values of equality, freedom of choice for individuals, etc. However, I understand a respect for the cultural views of others also as an important means to question Western cultural imposition and as assisting in the adoption of an ethical stance which allows learning and the reciprocal appreciation of both the advantages and the difficulties of different worldviews.

I am equally aware of the risk of experts overcompensating for their ethnocentric beliefs and assuming that all local practice should remain unquestioned as the most appropriate for the indigenous context. As I will elaborate upon in Chapter VI, I believe rather that the challenge must be for experts to consider the means by which to establish a *balanced* dialogue between themselves and those they work with. This should be a dialogue in which expert authority does not dominate and in which alternative views can, if necessary, be coaxed into the arena of interpersonal interaction and fully considered and responded to. I believe that it is only from such a constructive position that new cultural understandings and new, not-as-yet realised perspectives, are likely to emerge dialectically, both for the educational and generative benefit of the expert and for those that they work with.

Additionally, as I have argued, I believe that an appreciation of different cultural views alone is insufficient. Although there is a small but growing recognition within the literature of cross-cultural expert involvement in education and disability related work for a need to ensure programmes recognise, respect and adapt to local and diverse cultural understandings, I am concerned that the task for the expert must inevitably go far

beyond this. Rather, I believe that for experts working cross-culturally it is important to acknowledge that all cultures are inevitably in transition, even if that change is only brought about by the expert's very presence, and that the expertise of the expert should be in appreciating how to co-construct in relationship with others the nature of that cultural change. It is this further understanding of expert engagement in cross-cultural contexts as a process of tentatively, ethically concerned, reciprocal and generative change that also seems to have been overlooked in the literature.

As part of this complex process of change, the challenge for Portage experts would also seem to depend upon deciding what of their own knowledge regarding Portage and special needs issues is relevant and applicable and what might be problematic. That is, Western experts need to also crucially recognise the cultural-bound nature of their own views and knowledge when considering how they might relate to the different views of others.

I can also appreciate from my own experience that this acknowledgement of the subjectivity of our own Western understandings is not without difficulty and that:

“the concepts that we bring to another culture can and will get in the way. It takes a long time to work through the process of becoming aware of, understanding, and appreciating diversity. It is not enough to tell someone to be aware and be prepared” (Gregory, 1996, p. 49).

Similarly, I believe that even once this diversity of worldviews and the socio-cultural contingency of our own beliefs and knowledge are appreciated it also takes no less time or effort to forge the interpersonal relationship with colleagues and others which might enable the beginning of co-construction and the crafting of new, emergent ways of understanding and practising. It is also my contention therefore that an important aspect of the expertise of the Portage expert is the acknowledgement of the power dynamics and implications of their authority over others, such as families and local colleagues, coupled with their responsibility to practice accordingly. As I shall continue to discuss in the following chapter of this thesis, it is this systemic-relational appreciation of expert practice which has helped me to develop a new and developing understanding of myself, as the expert, and to explore new styles of expert practice.



## Chapter VI

### Epilogue: Towards A Systemic Methodology Of Expert Practice

#### 6.1. Introduction

“In the process of researching their own practice, individuals can create their own educational theories as they describe and explain their own educational development” (Whitehead, 1997, no page number).

Within Chapter I, I stated that the central question that my thesis would attempt to consider was; how might Portage experts, who are predominantly from the West, but who are invited to practice their professional skills in non-Western contexts, develop practically effective educational programmes and more collaborative and reciprocally beneficial ways of working with local colleagues and families, which are sensitive to, and respectful of, different cultural practices and beliefs? I have explained that my concern has been that with the expansion and exportation of Portage globally, especially through the efforts of Western experts working in diverse and culturally unfamiliar contexts, more thorough and reflexive research is necessary for the development and improvement of Portage expert practice.

Throughout this thesis I have also argued that Portage expert practice can potentially benefit from a growing multi-cultural appreciation and an increasing recognition of what might be called postmodern theory and practice challenges, which have already contributed to both research and practice debates within other professional fields. Indeed, with increasingly culturally diverse societies, even within the West, Portage and other educational experts who provide family-centred support are likely to find their practice more regularly challenged by families whose cultural beliefs may be very different from those of the professionals themselves.

Of course, I am aware that an acknowledgement that research of this nature is relevant to the actual practice of experts engaged with Portage programmes, may only be seen as significant by those experts, such as myself, who understand their practice as more than a set of technical, problem-solving skills. In fact, it may only be such experts who are likely to understand that a knowledge base related to expert *practice*, acquired through research and reflection, is needed at all. In writing this thesis I have been motivated by a desire to establish the beginnings of such a theoretical knowledge base, understood in

terms of my own educational theory which has emerged from my own expert practice and professional development. Consequently, in this final chapter of this thesis my aim has been to draw together its key themes, embodied in the claims to knowledge which form the present theory base for my expert practice, that I first introduced in Chapter I and which have also emerged from my research into my own expert practice. In the following sections I would therefore like to revisit these claims to knowledge so as to elaborate upon why I believe they represent concerns for Portage experts, to summarise my own learning and understanding, and also, where appropriate, to describe any potential implications I believe they may have for Portage expert practice.

In the course of considering these claims I shall also attempt to explain why I believe that each is inter-related to the others, as might be expected given their shared postmodern ontology and epistemology, and how each also implies a constructive methodology for Portage expert practice. Indeed, as the title of this thesis implies, I see this as a moving *towards* an improvement in my practice, with a recursive, reworking of an understanding of my praxis, with the knowledge generated being used to change that practice and not simply to merely study or understand it. In this sense, although this chapter will address the question as to ‘what the research has shown’, I avoid drawing any final conclusions as to do so would seem to run contrary to the dialectic, developmental themes of the thesis. Rather, my intention has been that my reflections upon my own learning regarding Portage expert practice may resonate with others and so help to provide a source of insight and assistance for them to construct their own understanding in order to inform their own professional judgements and hopefully to evoke new forms of practice.

This chapter therefore does not aim to suggest any sense of closure within my own research. In this way, following the ideas of Whitehead (1985, 1997, 1999) as I introduced in Chapter II, I have come to understand my change in understanding and ideas in the terms of a ‘living educational theory’. That is, the major propositions of my thesis, the claims to knowledge that I make, all centre around my own living educational theory. As this thesis attests to, this theory fundamentally rests on my belief that in our work as Portage experts with colleagues and others living in developing countries, a radical reconsideration of Portage expert practice is necessary if our expert practices are not to become wholly colonising and subjugating of localised knowledges and



indigenous practices, and if we are to ensure that our practice remains educationally generative, practical and ethical. It is a living theory in that it has a developmental nature as witnessed in the dynamic, enactive process of my coming 'to know', which occurred in relation to my own values and beliefs underpinning my actions, in my attempt to improve my practice. Considered in this sense, I believe that the idea of a 'living educational theory' opens the possibility for practitioners such as myself to shape their praxis in terms which render this not only educational, generative and innovative, but which also simultaneously reflects the complex, unique and original nature of their practice context. So while mine is a constantly developing epistemology of practice, it is also one which draws on real lived experiences, including my experience of learning, which I have been able to use to make sense of my past, present, and as I expect, also my future experiences.

## **6.2. Claims To Knowledge**

### **6.2.1. Recognising And Questioning The Epistemology Of Practice**

My first proposition is central to my other claims to knowledge that I describe within this thesis. It is that broader, epistemological questions about the expert practice of Western consultants need to be more openly acknowledged as a crucial aspect of the process of change regarding Portage programme development. These questions go beyond the usual focus upon questions about the techniques and technical details of programme adoption and adaptation. That is, while obviously most Portage experts think about their practice in the course of that practice or through later reflection upon that practice, the practice and research literature of Portage suggests that this thinking is usually just in terms of planning schemes of work.

Consequently, Portage practice questions are seen largely in instrumental terms in which the expert's task is primarily to choose between various sets of procedures, techniques and methods, to be applied to achieve a known end. This end is the establishment of a Portage programme which broadly reflects the Western image of Portage and its associated goals. When viewed so narrowly, questions of practice development in effect become viewed as solely a matter of "techniques and making techniques more efficient" (Usher and Bryant, 1989, p. 87). It is this restricted perspective of expert practice which may account for why much of what has been written about Portage programme development and the role of the Portage expert tends to be set in terms of management

and mechanics, highlighting the instrumental details of procedures implemented and the outcomes achieved.

By presenting this thesis, I have therefore argued for the importance of encouraging Portage experts to do what they seem to rarely do - that is to raise deeper questions of practice and to reflect upon the broader social processes and underlying epistemological assumptions of that practice. I believe that it is the failure of experts to first recognise and then to address these broader questions of their practice that has encouraged a narrow view of practice largely as a 'technology'. I am suggesting that Portage experts need to do much more than this and to begin to additionally *think about their thinking about practice*. In other words Portage experts, particularly those working within cross-cultural contexts, need specifically to think about what it is that structures their practice thinking and so to appreciate their particular epistemology of practice. I believe that when experts explicitly recognise that their practitioner knowledge and skills are based upon an epistemology, a reflexive act by the expert in itself, then the way is open for them to first think about and question the implications of their own particular epistemology (Schön, 1991), its ends and goals, and the associated methodology of practice, the relevance and variety of means open to them. It may then follow that Portage experts also recognise that there are other potential epistemologies and related ontologies and thereby also other practice methodologies.

Clearly, there are important parallels here between these questions asked of expert practice and the current upheaval within contemporary research as I have described in Chapter II and as detailed by Denzin and Lincoln (1998), Guba and Lincoln (1998) and Usher et al. (1997). These authors are among many who have drawn attention to both the alleged crisis and the enormous creative potential regarding *research practice* caused by the advent of postmodernism. However, in general within the literature less direct attention appears to have been given to the implications for *practitioner practice* brought about by postmodernism and the implications of a postmodern epistemology for the practices of how that knowledge is applied. For example, it is rare to read any reference to postmodernism within the Portage literature and so consequently we hear little about its potential methodological implications for Portage expert practice and/or any interest in building a related postmodern practice epistemology. In part, it is towards redressing



this gap, certainly within the Portage literature, that has been my own action research concern.

Indeed, as 'the problem' of childhood disability is usually portrayed within the literature in the terms which picture it as both objectively identifiable and of internationally pressing concern, the implied haste needed to address 'the problem' frequently suggests an urgency for action which perhaps further limits the opportunity for any deeper questioning of the expert's knowledge and practice. Consequently, attention to questions of how and why the expert actually went about their practice in the manner chosen are frequently submerged under these technical-rationality narratives of change, narratives that effectively provide an invitation to what amounts to forms of colonial practice. As Portage experts we rarely seem to ask ourselves, or indeed appear to have time to contemplate, questions such as: 'how do we actually go about implementing these particular problem-solving practice processes and why do we do this in such a manner?'; 'what sort of practice are we constructing?'; 'what is shaping our practice and our thinking about our practice?'; or 'what are the basic underlying assumptions of Portage and why or how did they arise?' Where questions are reflectively asked of Portage and expert practice, it seems that these also typically do not go beyond researchers and practitioners using the very same technical rationality that they use to legitimise their practice in the first place. So often it seems that the actual processes of practice are only thought about, judged and viewed primarily in terms of whether they reached the ends they set out to achieve. Therefore, perhaps it is not surprising that most Portage reports appear to largely do little more than continue to reiteratively rationalise current practice and so remain divorced from contemporary postmodern questions and themes.

This preoccupation with the technical discourse of practice may also account for why there is almost a complete absence within the Portage literature of questions foregrounding the Portage expert's *personal* beliefs and actions. For example, we hear nothing of how the Portage experts thought about and negotiated their relationships with others, or of how their practice responded to, accommodated, or was enactively changed by the context in which they found themselves. Indeed, within the literature there is little sense that expert practice is fundamentally a *social practice* rather than a technical exercise. Yet Portage expert practice is social both because it inevitably involves relations between people and also because what are authorised and legitimised as

acceptable activities which count as expert practice, vary between the social communities in which particular forms of practice arise. Even when Portage is implemented by Western experts in developing countries, where questions of personal values and beliefs and cultural diversity and difference could be expected to be most apparent, the narratives of international Portage reports continue to stubbornly focus their attention upon the allegedly rational instrumental techniques of how Portage might be implemented.

Through reflecting upon the prevailing and dominant conceptual position of Western research and expert practice, detailed in Chapter II, I have tried to account for this neglect of these wider practice questions and the dominance of the technical discourse within the Portage literature. In terms of my understanding, it seems that it is precisely the modernist/positivist and essentialist epistemology underpinning these technical-rational Portage narratives that might explain why the particular personal assumptive worlds of the Portage expert, the means by which they themselves attribute meaning, are hidden.

To recap, through paraphrasing Scott and Usher (1996), these modernist assumptions encourage a view of practice characterised by several key features. These include *determinacy*, in which it is assumed that there is an underlying truth regarding expert knowledge, that can be known, and a *rationality*, which holds that there can be no alternative, contradictory explanations, but rather there must be a convergence towards a single explanation. Furthermore, this epistemology esteems *impersonality*, for its objectivity, and values *prediction*, for its ability to generalise and to offer the possible control of events. Perhaps most restrictive, is that the modernist epistemology of practice is *non-reflexive*: in its failure to draw attention to itself as an epistemology and also that it is not the only conceivable epistemology; in its exclusive concern with methods and outcomes; and in its failure to adequately address questions about either the processes of research or, the concern of this thesis, expert practice itself. Moreover, it is also through this modernist epistemology privileging a technical-rationality in which expert practice is seen to stem from the conclusions of a thoroughly rational means-ends process, that consideration into alternatives forms and means of practice, together with the personal and social aspects of practice, are viewed as unwarranted and thereby



effectively and automatically excluded. Consequently, the deeper origins of the decisions which shape Portage expert practice become very difficult to identify.

As I also explained in Chapter II, what my research into my own practice has helped me to understand is that there has been a pervasive and conventional positivistic epistemological tradition and perspective within the West which has encouraged a separation of theory generating research from practice. Through coming to recognise this historical tradition, I have also appreciated that if positivistic researchers have taken their epistemology for granted, then this might explain why epistemological neglect has also been the case for practitioners. Indeed, questions about the actual epistemology of any practice have traditionally been viewed as primarily the concerns of academic theory rather than of theory applying practitioners. So it may be that through practitioners restricting their practice concerns solely to the means by which theory might be most effectively applied, that this also provides a possible explanation for why the technical-rationality discourses of Portage expert practice have been encouraged and sustained. Anchored as they are within such a modernist conception of the world, most Portage experts seem to have taken their practice as natural, so that it has not even been acknowledged as a potential object of questioning beyond technical concerns. Building upon the ideas of Usher et al. (1997) in relation to research, it seems that this very lack of questioning of Portage's own epistemology may also explain why the technical approach to Portage practice frequently lacks any sense of reflexivity, in that while it is frequently methodologically critical, it is rarely self-critical.

I have also described in Chapter III how I too, following the ecology of ideas into which I had been schooled, initially held only a technical-rational view of practice. As with Portage experts generally, I understood my role as essentially part of a rational planning discourse. Firmly entrenched within this discourse, I viewed planning as a systematic, information based process composed of fixed stages from problem identification and assessment through to implementation and later evaluation. However, as I have also described, faced with the 'realities', dilemmas and contradictions of working within a different cultural context I slowly began to understand that my practice could not consist of discrete steps or the 'text-book' ideal of rational development, in which I had the luxury to choose between various techniques drawn from my expert theoretical knowledge. As such, I came to both recognise and then to question my own

commitment to a modernist epistemology and ontology, and to realise that my practice in such contexts was actually a process of coming to terms with conflicting interests in the course of which certain subjective choices are made, often based upon prejudice or custom, and that other possibilities are thereby potentially excluded. By reflecting upon my earlier understanding of practice I realised the limitations of the modernist epistemology and the related technical planning discourse to explain all of what I was experiencing. In this way I began to appreciate that within my earlier practice epistemology, practice is never openly acknowledged as I was experiencing it, as a highly complex process coloured by a great deal of uncertainty in which coming to know how 'to do' practice, calls for the expert to tread a very delicate path, in which the expert frequently sways between episodes of knowing and then periods of not-knowing.

As I have also described in reference to my own practice, I now recognise that one of the potential dangers with this overly technical approach to understanding practice is that the decisions can often be made by the expert beforehand. For example, when I first arrived in Namibia and sought a possible plan for change for Department Three, I 'knew' Portage to be the solution to Department Three's problems because my expert knowledge assured me that it had been so successful elsewhere in the world, and that the main challenge would be teaching local people the Portage 'way'. In such circumstances practice effectively leads towards foregone conclusions, prefigured by the manner in which the problem is subjectively set, an unquestioned desire to achieve a singular end and the expert's favoured means of intervention.

In Chapter IV, I attempted to further reflexively re-examine some of the underlying assumptions of this kind of technical planning discourse. I described how I have come to understand how the basis of such a planning approach to practice, is often primarily related to the definition of the 'problem'. I also described how from my own reflections into this aspect of my expert practice, I began to appreciate that the first question that experts might usefully consider is whether there is such an obviously straightforward and objective world of problems with which their practices claim to be concerning themselves with. I came to appreciate the need to consider whether our target problems are simply reflections of our own constructed abstractions drawn from the complex, often contradictory and contextual mess which confronts us as we attempt to go about our work (Schön, 1991). Indeed, it was by questioning my own practice and its



underlying modern epistemology that I came to understand that there was a tendency for me, and presumably also other Portage experts with similar backgrounds and training, to take my own practice as providing a truer description of reality than the realities of others, and to believe that my description was uninfluenced by my own personal relation to that reality. I also became aware that this tendency for experts to objectify their own understandings of 'the problem' is apparent in many of the expert reports contained within the Portage literature. Certainly, it would seem from my review of the literature that experts, by largely and unconsciously adopting a modernist epistemology, are generally failing to seeing themselves as also part of the system for which they plan to change and improve, a system which as Hoffman (1993, p. 40) described is a "system that is formed by a conversation about the problem".

Of course, even if I have convinced the reader at this stage that such deeper questions regarding Portage expert practice have been neglected and that they might be of some academic interest, the question must be whether they serve any purpose beyond this? After all, Portage, by its continual expansion globally must presumably be proving adequate even without Portage experts addressing such questions. Perhaps this might be summarised crudely as the 'so what?' research question. Does it matter that Portage practitioners do not ask deeper epistemological questions regarding their practice? Do we as Portage experts need other styles of practice if the present manner of practice is ostensibly proving so effective? Clearly, my thesis rests upon the fact that I believe it does matter that we consider these questions for ethical, practical and educational reasons and that as experts we do need to consider new forms of practice.

In the first place I believe that unless experts recognise and reflect upon the epistemologies of their practice and thereby also ask questions about the methodologies of that practice, then their attention will continue to largely remain diverted from the possible inadequacies in their own practice. These inadequacies include for example its irrelevance to the priorities of local people, its oppressive, colonial potential, and the tendency for Portage experts to continue to encourage the blaming of external factors, rather than their accepting their professional responsibility for improving their own work. As I suggested in the review of the Portage literature in Chapter I, there is already evidence that the West readily views the problem of disability in terms of deficits of skills and knowledge within developing countries, deficits that Western experts can 'fix'

providing local people accept and then follow their advice. The potential consequences of this narrow perspective can be seen in the explicit examples within the Portage literature where narratives of blame are evident regarding the actions of families and colleagues which do not tally with the expert's own priorities. I believe that this unhelpful stance is unlikely to improve unless we can begin to develop ways to think about and act so as to engage positively with cultural difference through means that are relevant to local contexts. This improved practice can surely only come about when experts first take responsibility for, and scrutinise more reflexively, their own practice.

Indeed, with the growing challenges of globalism, multicultural societies and postmodernity, if Portage experts are to be viewed as genuinely professional, they need to begin to more thoroughly interrogate the basis of their professionalism. Although, it is possible that experts do not need to develop a reflexive awareness of their own practice and its epistemological basis to be competent, I believe that such an awareness may take them beyond mere competency and towards an improving and reshaping of their practice. It is only through this level of interrogation of their practice that Portage experts might begin to ensure that those they work with and advise are supported by professional experts who have a commitment to improving the quality of their practice and learning - both their own and their colleagues.

I am concerned that all Portage experts, but especially those working within cross-cultural contexts, need to develop such an understanding of what it means to participate in a professional form of reflexive and reflective knowing and acting, since the Portage literature suggests they do not have that understanding to any great extent at present. As I have come to understand, it is likely that through first thinking about their practice epistemology, through this meta-knowledge, that experts may begin to empower themselves as professionals and to value that they need a commitment to change, not just in terms of the techniques of their practice to achieve given ends, but also in terms of the wider processes of their practice. Essentially, this is about recognising that the methodology of expert practice is much more than a concern with methods of practice. It is also about human behaviour, attitudes, values, beliefs about knowledge, power relationships with others, and ultimately it depends on our own deep-seated beliefs about why we are involved in our professional endeavours and where we see them as heading.



Clearly, there are also additional ethical questions raised about practice when experts reflect upon epistemological questions. When experts fail to see themselves as part of the systems in which they are attempting to introduce change, then there is an effective distancing of themselves as experts from the effects of their practice. This has important implications for how they understand their responsibilities for the changes brought about through their practice. That is, by failing to raise questions about expert practice, I believe that this may have encouraged many Portage experts to view others as those they practice *upon* or *for*, rather than partners with whom they practice *with*.

As I have tried to demonstrate in the reflections upon my own shifts in understanding about my expert practice, a postmodern, systemic awareness does not necessarily, as some critics of postmodernism have claimed, absolve the expert of any personal responsibility in the actual action that they and their colleagues subsequently take, as regarding the ethical standards of practice and the effect on those who receive the services and support engendered by the change in the educational programme. Rather, I believe that in effect the nature of asking such deeper questions of practice can lead to further concerns with the systemic expert-colleague relationship as I shall continue to discuss below. I think that by virtue of the reflexive interrogation of our underlying practice epistemologies, that this can engender a concern with interpersonal processes such as power, the ethic of participation and mutuality, all of which seem to ensure that more ethically concerned practices emerge by defining with greater transparency who we, as experts, are and how we should be.

As I have described in Chapter IV, working with colleagues and others systemically within a cross-cultural context, including the evaluation of this work, becomes one of considering the nature of the processes which deal essentially with a series of ethical dilemmas, including issues of control, collaboration, and so forth. A systemic view of expert practice prioritises a concern with ethical and good standards of expert practice, rather than primarily the ability to implement a Portage Programme so that it may provide tidy quantitative data for objective evaluation of change. That is, while social constructional approaches adopt the notion that truth is relative and so avoid foundational beliefs in our thinking, they do not deny that we continue to hold these relative contingencies or principles, on which our codes of ethics are based. In short, these ethical principles represent the boundaries of our professional behaviour and are

the contingencies in which we choose openly to place ourselves as professionals (Stewart and Amundson, 1995). Furthermore, I also believe the failure to ask deeper questions of our practice and to consider these in reports of our practice, not only robs the reader of a fuller understanding of the practice and research context, but may also perpetuate a form of alienation and dehumanisation of professional practice, while simultaneously concealing a host of power related issues to do with knowledge and control.

For all of these reasons therefore, I believe that it can be argued that there is a great importance for the surfacing of expert practice epistemologies, questions of which can potentially have profound implications for Portage practice in terms of how it is enacted and how it is understood. Despite my views about expert practice, it is also clear that such ideas have not yet been widely taken-up within Portage practice. I am therefore concerned that as long as Portage experts take the actual manner by which they go about their practice for granted, then they will continue to primarily embrace institutionalised, technical-rational Portage practices and so override any appreciating of the diverse meanings that people in other cultures use to understand and make sense of their lives. As I have also argued in Chapter V, despite the best intentions of experts, this apparent general failure to ask such questions and so to recognise and appreciate the worldviews and beliefs of others, can have oppressive and damaging consequences for those we work with. In effect the non-reflexive, technical narratives of Portage practice have become another powerful taken-for-granted single-minded 'form of knowing'. These concerns I believe also provide strong reasons for arguing why we need to scrutinise more thoroughly the practice of Western Portage experts and think about new, alternative expert ways of working (and researching) in developing countries so as to be respectful, sensitive and relevant to the culture in which Portage expert practice takes place.

Indeed, I have also argued Portage should be seen as very much part of the wider international development movement, although it is also rare to find any reference to this within the Portage literature. Yet when Portage is applied through international schemes to developing countries it cannot escape these wider development issues, and the international development movement itself, as with other fields of practice, is also experiencing something of a crisis brought about by the failure of modernist Western development policies which has led to calls for a rethinking of development (Dubois,



1991). Certainly, regarding international development generally, several authors have been curious that it too continues to expand so rapidly given its apparent failure to achieve its stated aims over the last quarter of a century (Sachs, 1990; Escobar, 1995). Furthermore, it seems that in part, this failure may also be attributed to the practices of Western experts disregarding wider cultural and social questions and different meaning systems, preferring to narrowly and non-reflexively adopt a technical-rational paradigm for practice. Consequently, the apparent international popularity and alleged effectiveness of Portage as portrayed by the literature cannot simply be taken as a clear measure and indication of satisfaction with Portage by the people within whose communities it has been applied.

In this thesis therefore I have also argued that when we as Portage experts start thinking about our practice in terms of our practice epistemology and ontology, then I believe we are then better placed to consider how our practice is always enacted through both an explicit and an implicit set of socially constructed values. More specifically, as I shall discuss further below, I have called for the embracing of a postmodern epistemology of Portage expert practice. I have found that postmodernism and the related field of social constructionism offers a philosophical basis for shifting my own thinking and practice. I believe that it is through such a postmodern epistemology of practice that as experts we may appreciate how our practice is never primarily based upon some objective, neutral truth claims about what is best and in which direction improvements lay derived from information gathering and rational planning as the mass of Portage literature implies. I feel confident that when Portage practice begins to encompass a postmodern practice epistemology and ontology, then the methodology of practice will shift away from concerns solely with issues of ensuring technical competence to an understanding of practice as a means to generate new and diverse forms of practice which are locally meaningful for those we as experts work with. By this means we as experts may importantly cease to see our practice as just a means to problem solve and so produce another version of Portage which is apparently more culturally adapted to local needs, as if this was an end in itself. Rather, we may begin to value our practice and our expertise for its process 'know how', especially the know-how of forging more equitable relationships with others, of engaging with difference and strangeness, so that we develop the ability to generate new ideas and actions, which break out of, or build upon, old systems of thought. This new epistemology therefore is about new ways to think

about how to practice and, as with research, it is surely only through thinking about new ways to practice that new forms of expert practice will eventually emerge.

### **6.2.2. The Importance of Reflexivity and Reflection**

My second claim to knowledge is that Western experts importantly need to also begin to reflexively and reflectively question their own beliefs and knowledge regarding their practice and Portage and so consider those aspects of their practice and the programme which legitimise certain ways of understanding while also potentially subjugating others.

Appreciating that there is an epistemology and a related ontology underlying all Portage expert practice, one which has methodological implications and which needs to be unveiled and then questioned, is clearly the first important reflexive step that the expert can take as they reflect upon their own expert knowledge and practice skills. As I have described in Chapter III and Chapter IV, in the course of my work within Namibia my own recognising that there were questions that needed to be asked about my expert practice beyond the immediate technical concerns, was also the beginning of my reflexive awareness and understanding of how reflexivity represented a useful conceptual tool for deconstructing the unacknowledged epistemological baggage of Portage and my own practice.

Moreover, as I have also described, it is only a very short step from first asking reflexive questions about one's own professional practice and practice epistemology to then beginning an interrogation of one's personal self-understanding (Lax, 1992). In this sense reflexive questioning represents the start of a inner personal journey and also one in which the 'personal' may be seen as embedded in the wider 'social'. As I have also described in Chapter IV, it was later, by researching into and reflecting upon my experiences within Namibia, that I was able to associate and frame the course of my inner journey within the theories of second-order systemic and social constructional ideas that I encountered as part of that research.

Following my arrival in Namibia, it had initially been my expectation that any change that I became involved with would be related primarily to 'improvement' in the knowledge and skills of my local colleagues brought about by my sharing of my skills with them, rather than the development of any significant shifts in understanding of my



own practice. In short, I understood my role as a 'change-agent'. However, as this thesis attests to, I soon came to appreciate how this first-order practice perspective was rapidly challenged when I started to realise that for any appropriate changes to occur within the complex interpersonal, cross-cultural context in which I found myself, that it would necessarily also entail a profound shift in my own understanding and so lead to a great deal of learning and transformation on my part too. As I have described, this appreciation of a need to change my own thinking came from confronting a series of programme and inter-relational challenges.

Following this realisation I also started to appreciate how I, myself, with all of my pre-understandings, values, beliefs, prejudices, ideological commitments, etc., was effectively my own key instrument in the process of change and that any change was bound up and also dependent upon my own professional and personal skills in negotiating and managing the complexities of local relationships with my colleagues. Consequently, and unexpectedly, the whole activity of learning how to relate to my colleagues and others, how to 'engage with difference', itself became the primary focus of my professional endeavour. I further realised that I personally could not stand outside of the local system and influence or manipulate it by the application of my expert knowledge and skills. Rather, by my very presence and also by my difference, I was inevitably, wholly and deeply embroiled, second-order fashion, in the local system. Therefore, I began to appreciate that whatever changes that took place within the local context, I inevitably had to share in the responsibility for those changes. As I have described in Chapter IV, it was these very challenges of confronting cultural and individual difference that also forced me to reflexively re-examine my own assumptions, beliefs and worldview, although it was not until my later research into my practice that I became familiar with the concept of reflexivity described in the research literature and so was able to retrospectively put a name to this particular form of reflectivity.

Although my first reflexive step was ostensibly a form of personal reflexivity, a clearer identification to myself of my own ideas and values and also of my own informal theory of practice, I was also able to trace some of these beliefs firstly to the influences of my professional education but also further to my own wider cultural background. In my thinking about the tension that I experienced between what were the emerging and different ideas about Portage and my practice which seemed to be relevant to northern

Namibia, and my original understanding of Portage and professional practice, I found it reflexively relatively easy to also understand how all expert practice, including that related to Portage, emerges from and takes place within a specific 'community' (Kuhn, 1996).

Acknowledging the pervasive power of one's own professional community and the manner in which my own professional knowledge also could represent a restrictive disciplinary practice, was another further step in my professional transformation. I began to appreciate how all expert practice is fundamentally and crucially a social process and that all expert involvement is inevitably therefore a social practice. That is, I realised how the original Portage model as a special educational needs programme and my own professional expert practice, were the conceptual manifestations of the wider socio-cultural contexts from which they emerged. Again, echoing Foucault's ideas some of which I briefly outlined in Chapter II, this was my own acknowledgement of how my home culture contained a repertoire of dominant narratives which guided and shaped my thinking, including my own inner conversations with myself as I pondered on problems and my relationships with others.

In this sense I came to understand how reflexivity is more than just a reflective inquiry into ourselves and our individual autobiography. Rather, this broader reflexivity positions the self as immersed and forged within wider, shifting socio-cultural processes, or 'networks of conversations' as I described in Chapter IV. These broader discourses construct our understanding of practice and also how, as experts, we come to understand the problems, situations, events, and outcomes related to our practice. In this way when expert practice is viewed as a social practice, it is revealed as not simply an individualistic endeavour, as the modernist notion of the ideal 'knower' might imply. Rather, reflexivity forces us to see the self of the expert practitioner as an embodiment of a wider, ecological, social entanglement and ultimately as socially embedded. By thinking in terms of this broader, socio-cultural reflexivity, it becomes possible to appreciate how such social practices might authorise certain socially acknowledged, accepted knowledges, whereby only particular forms of expert practices, which concur with these knowledges, are legitimised.



Furthermore, as such an understanding of reflexivity also highlights how practices and knowledges are always localised and context dependent, so it also questions the notion of expert practice ever being an apolitical, asocial technical process which is universally applicable as the positivistic epistemology would imply. Therefore, in my view the value for experts cultivating this sense of reflexivity is that it allows us as professionals to try to begin to unmask those social processes which are intrinsic to the production of our conventional 'forms of life' (Gergen, 1999). This is not to claim that as experts we can ever avoid or step out of these discursive or narrative ways of understanding, but it may allow us to shift between them, and from adopting their different perspectives and understandings, acknowledge their influence, partialities and socially constructed nature.

In this way I think that reflexivity can also serve the additional function of challenging the taken for granted and sometimes long-standing boundaries by which we construct and through which we legitimise our expert practice. As I shall return to discuss below, the importance of this insight might be that by reflexively acknowledging conventional Portage knowledge and practice as fundamentally a social practice, that is seeing it systemically and as one among many possibilities for thinking about special needs, families and action, this may therefore serve as a catalyst for accepting new or different ideas and wider interchange. Indeed, beyond simply a concern with Portage per se, when we begin to conceptualise and recognise how we create our 'forms of life', or versions of reality in our own terms, through our metanarratives and discourses, then we may also begin to have the opportunity to change, rethink and invent new forms of expert practice. As I have described my understanding of reflexivity, it is clearly more than practitioners just being 'up-front' about the possible socially constructed discourses and wider influences which may have coloured their professional perceptions and preferences. Rather, through the description of my own practice and learning I have tried to demonstrate how I have come to understand how reflexivity has important methodological implications for expert practice.

Throughout this thesis it has therefore also been my contention that highlighting these broader questions of expert practice, asking reflective and especially reflexive questions of practice, effectively transforms and frames expert practice as praxis (Carr and Kemmis, 1986; Siraj-Blatchford, 1994; Carr, 1995). As I described in Chapter II, praxis is usually defined as practice which entails committed and informed action, dialectic

thinking and dialogue. But importantly, I believe that praxis also encourages a certain humility in our thinking and beliefs by revealing the ‘parochialness’ of our socio-cultural forms of understanding. Understood in these terms, praxis encourages the practitioner to think about meanings, their own and those of others, and the implications that these meanings have for their own practice and especially for the implications of how their practice might influence others. It involves thinking about how we construct our realities through our use of particular forms of language - its images, concepts, metaphors, narratives, etc. In this sense as I also described in Chapter II, reflexivity demands that practitioners become practice-researchers in that such praxis inevitably entails practitioners ‘re-searching’ into their own practice and also into themselves as practitioners embedded within these wider social practices.

I believe that reflexivity, as a skill and characteristic of praxis, might not only be something forced upon the practitioner such as through challenges to their assumptive worlds, but that it may also be cultivated and consciously developed by the expert both through extending their reflective practice thinking and via researching into their own practice, such as through new paradigm individual action research. As I have referred to in Chapter II, postmodern metatheory actually calls for the development and foregrounding of the ways in which we construct our practice so that this reflexivity becomes a useful practice resource. I have tried to capture this inner reflexive journey in reference to my own changes of understanding within this whole thesis.

Of course, perhaps the lack of reflexivity within conventional Portage research and practice narratives accounts for why any substantial notion of change on the part of the expert and their practice is curiously absent. Typically, although a concern with change is usually the primary focus of the Portage expert practitioner, it is usually only portrayed in unilateral, first-order terms. Yet, as my experience has taught me, when change in one’s practice is also acknowledged as a necessary part of expert practice, with the expert exploring ways to change their own practice, then a new understanding of that practice, and thereby also of self, is more likely to emerge from that process.

Reflecting upon the wider changes to my own expert practice and to my understanding of that practice that took place within Namibia, I can see how an important consequence of my own early reflexivity was that I also began to shift my practice away from simply a



concern with the management of technical action to one which included the 'management' of understanding and meaning, both my own and that of my colleagues. This concern with the management of meaning included my thinking about the manner by which the views and understandings of others might also be heard, acted upon, and mutually learned from. In this way I believe that a reflexive 'management' of meaning helped me to further increase my professional sensitivity to the plurality of experiences of those I work with and so further encouraged a deconstruction of my tendency to privilege my own cultural beliefs as I have tried to identify within Chapter IV. In the course of my changes in practice, I am convinced that reflexively viewing my expert knowledge and skills helped me to begin to appreciate not only how the meaning I attributed to my practice was contingent for legitimacy upon my own wider socio-cultural context, but also the potential for my meaning to subjugate, colonise and so invalidate the meanings of others.

Furthermore, I am convinced that embracing reflexivity within our practice as Portage experts, also offers much more than the methodological advantages I have just described and an ability to increase our appreciation of the vast diversity of cultural and individual beliefs. Again, drawing upon my own learning-experience both within Namibia and from my subsequent research, I have increasingly understood how reflexivity can also have a generative potential, one which is realised through it challenging practitioners to question their implicit knowing-in-action and thereby generate their own new theories-in-action.

This returns us to the ideas of generative theorising described by McNiff (1988) and Whitehead (1985) that I introduced in Chapter II related to ideas of how practitioners might begin to develop their own personal 'theories' based upon their practice as part of the continual reflective process of change. I think it is important to stress this notion of a continual reflective process of change, as it underscores an understanding of reflexivity as a continuous process. It is not something that the expert solely engages in at the beginning of their practice or episodically, although this might happen also. Rather, in terms of thinking about my own reflexivity which emerged when working with my Namibia colleagues it seemed to occur as flashes of self-directed questions, usually in response to surprises and challenges which led to further questions about my own self-understanding in other areas. My understanding is therefore that reflexivity is a process

which the practitioner threads into their practice, sometimes deliberately, but often unexpectedly, throughout the course of their practice and even their subsequent reflective thinking about that practice. Conceptually therefore it might be said to occur at a variety of levels and to overlap and merge with the concept of reflectivity, but to ultimately go beyond reflective practice thinking.

Although Schön (1991) did not refer specifically to reflexivity, he did distinguish between different levels of reflection-in-action. For example, he noted that sometimes “reflection-in-action tends to be limited to consideration of the effectiveness of strategies of unilateral control” (p. 235), but that in its most generative and creative form reflection-in-action provokes deeper reflection such as about the practitioner’s role frame, problem setting and theory-in-action. In this sense, Schön seemed to be referring to what I would understand as reflexivity - an implicit, dynamic characteristic of expert praxis. Perhaps this might be called a ‘reflective reflexivity’ in which the practitioner perpetually questions, rethinks and reshapes what they think, know and believe as potentially new understanding and knowledge is brought to their attention throughout the course of their reflective practice. It must however also be about the practitioner searching and accounting for the possible sources of their present knowledge and modes of expert thinking. As I am aware from my own practice-research, understood in this manner it is a reflexivity, a systemic second-order awareness, which continues into later thinking and writing about practice, although it is also one which is difficult to perpetually maintain as first-order concerns and ‘knowing-that’, repeatedly resurface in the course of practice. Nevertheless, it is in this sense that I understand reflexivity to be generative, although as I shall expand upon later in this chapter, while this creativity may occur through individual practitioners reflecting upon their practice as described by McNiff (1988) and others, I see it as essentially also emerging from dialogue and social interchange, especially that which takes place within contexts of substantial cultural difference.

It seems therefore that as a hypothetical, cognitive concept, reflexivity can be closely coupled with the concept of generative theorising, and that through this means it is possible to appreciate how such a process may lead to a questioning of conventional assumptions and possibly reveal new alternatives for thinking about expert practice and action which are weighed against what we already ‘know’. It is through such reflexive,



generative theorising, as I intend this thesis to demonstrate, that I believe we may be able to add to the current wealth of socio-cultural intelligibility, and further develop the potential resources available to Portage practitioners by which they understand and carry out their practices.

It is also through the generative capacity of expert practice reflexivity that we may begin to witness a further evolution in the concept of, and practice of, Portage, certainly as applied to the cross-cultural contexts of developing countries. Perhaps foremost in this evolution is the valuing of the mutuality of negotiation, the importance of interpersonal relational processes in practice, and the significance of appreciating, respecting and engaging with difference in the processes of change. In this new light, practice would become increasingly concerned with issues of genuine interchange. Therefore, associated with the generative potential of reflexive expert practice are also concerns with how practice might ensure dialogue. As I have described, the most positive and generative shifts in my own understanding occurred when I began to appreciate, through the changes in practice spurred by reflexivity, that my expert role was not primarily to transfer my Western knowledge and so enlighten my colleagues' thinking and skills, but rather was one very much concerned with forging collaborative and reciprocal relationships.

### **6.2.3. Interpersonal Processes And Engaging With Difference**

In contrast to how Portage expert practice is usually portrayed, I believe that within the cross-cultural contexts of developing countries, expert practice related to Portage programme implementation should be understood primarily as concerned with the processes of interpersonal interaction, of how to foster these relationships and especially the challenges of engaging with difference within relationships.

It would seem that with increasing levels of globalisation and world-wide communication technologies, people are more frequently relating with others whose constructions of what is and is not, what is good or bad and how this may be known and so on, may be very different from their own, as I have described in Chapter V. So, as demonstrated by the international expansion of Portage, very different peoples and worlds, very different local rationalities, are placed in contexts where there is a need to

try to co-ordinate and perhaps to attempt to do so without having one voice or rationality silence and subjugate others.

Indeed, reading the Portage literature, particularly that related to Portage within the West, I am struck by the apparent contradiction of how while at one level the tacit discourses seem to be of certainty and control, at another, quite explicitly the narratives convey calls for changed ways in which experts and others relate to each other. These include moves towards empowering others, team working, flatter hierarchies, and diversity within programmes. However, it is difficult to see how this can be so, especially when Portage is applied in a cross-cultural context found in developing countries, while the implied subject-object relations and other narratives contained within the bulk of the Portage research literature are essentially hierarchical, frequently constructing differences in essentialist terms of right and wrong, so as to justify intervention and manipulated, managed, and structured change. As I have argued, such relations are more likely to be in place if Portage experts fail to reflect with any depth upon questions of their practice, so that practice outcome is essentially predefined and reconstructs familiar forms of Portage.

However, by arguing for first a recognition of the need to raise broader epistemological questions and then for the expert to reflexively interrogate the socially constructed beliefs underpinning their expert knowledge and practice skills, I have particularly tried to draw attention to the inevitable social processes and practices which characterise Portage expert practice. I have also drawn attention to how these social practices can both construct and legitimise certain forms of practice and views of the world while also potentially excluding others. I argued that the potential implications for the practice of the reflexive expert taking such a perspective include: their embarking upon a journey of reflexive self-understanding; a seeking of an awareness of how the delimiting effects of one's own social constructed worldviews might affect both oneself and others; and also the generating of new, contextually sensitive and less colonial forms of expert action by the expert themselves. I implied that this generative potential of reflexivity was most likely to stem from forms of expert practice which encouraged dialogue with others and so also the conditions for social and communicative interchange.



I believe that the consequences of viewing Portage practice primarily in interpersonal relational terms can have profound implications for expert practice. As the review of the Portage literature in Chapter II indicated, to date there have been few accounts of Portage practice, certainly as it is applied within the context of developing countries, which have emphasised the interpersonal nature of expert practice. When the interpersonal aspects of Portage have figured in the research literature, this has tended to be limited to studies of Portage implementation within the West and even then these have been largely restricted to the nature of the relationship between parents and the supporting Portage worker, with little attention to the role of the supervising consultant. Moreover, in cases where the parent-Portage worker relationship has been referred to, this has rarely been theorised in any detail and there has been little questioning with regards to the implications for understanding of expert practice or of how we as experts might go about establishing such relationships. This is surely a staggering neglect within the Portage literature when it is considered that fundamentally Portage is implemented by people for people through processes which entail people doing things with other people.

Issues of personal and social interchange are therefore clearly fundamental to the efficacy of Portage, and Portage practice might be defined above all as quintessentially about interpersonal interaction. In fact, personal relationships are the medium through which all experts, who work with other people, inevitably have to work. In stark contrast to the usual Portage literature narratives, I have come to understand that if we think about Portage in terms of interpersonal relationships that this reinforces an epistemological understanding of it as a social practice which importantly always takes place within a social relational context. I believe that conceptualising Portage in these social terms encourages an appreciation of Portage and expert practice as primarily having validity and meaning within that specific social context. As I have described elsewhere in this thesis, this view is contrary to how Portage is typically validated, when transcendental methods of evaluation are usually assumed to apply. Indeed, this conventional stance can be witnessed not only within the Portage literature generally, but also in the comments of the external evaluation team who visited the Engela Portage Programme as I described in Chapter III.

However, it may be that through epistemological and related methodological shifts in perspective regarding Portage and expert practice, that as experts we might then also

start to appreciate that Portage can have very different and new meaning for others, certainly from that portrayed by the original understanding of the model. Within Namibia, as I also described in Chapter III, I certainly felt that when my expert practice shifted to a principal concern with the social and interpersonal context, that this helped me to begin to generate a new understanding of, and attribute different meaning to, the Engela Portage Programme as well as the potential of Portage generally. As I have also described, this new meaning regarding Portage appeared to be one which was very relevant to my Namibian colleagues and to families locally.

Of course, within the general literature the term 'relationship' has numerous meanings. Moreover, it could be argued that all Portage experts are involved in some forms of relationship all of the time whether they lean towards underlying technical-rational epistemologies of their practice or to more postmodern understandings and associated methodologies of practice. However, I believe that with regard to a systemic epistemology of Portage expert practice the notion of relationships differs significantly in that, as with reflexive questions of epistemology, it encourages the surfacing of questions of interpersonal relationships and the recognition of the primacy of such relationships in shaping the professional endeavour. Indeed, by drawing upon social constructional ideas, a second-order systemic epistemology emphasises the crucial centrality of relationships in conceptualising all aspects of our existence as being fundamentally socially and relationally concerned with exchange.

It is important therefore to stress that in my claim to knowledge I intend the term 'relationships' to refer to more than simply the negotiating with others in order to ensure permission for expert involvement, as seems to be implied in some of the research literature. I have also noted that the dominant scientific discourses of relations contained in much of the Portage literature, and indeed educational expert texts generally, seem to understand and treat 'relating' as an individual action performed in order to know about, and to achieve influence over others. In doing so the modernist expert constructs these relations in such terms that they leave tacit and unconsidered their own involvement. In such relations the expert effectively positions themselves as the acting, knowing, influencing 'subject' in relation to 'other' as object. As I have noted earlier in this thesis, this sort of relationship can be seen in the series of first-order questions that some



authors have suggested might be asked of local communities in order to determine the communities' ability to benefit from a home-based teaching programme such as Portage.

In contrast, I understand relationships to be about enlisting the full co-operation and participation of others so that *together*, in the course of developing Portage, it is possible to begin to transcend the technical discourse of Portage practice and to generate new, contextually relevant and unique forms of practice and forms of Portage. Understanding relationships in this systemic sense calls for an enactive negotiating with colleagues so as to foster joint-action, joint-learning, and mutuality. So this systemic view of relationships is very much concerned with the quality of the interactions between the expert and those they work with as they develop co-operation and trust. Viewed in these terms relationships themselves can also become a fundamental source of learning. Clearly, the nature of the relationship between the expert and others is therefore vital to expert practice as it represents the hub around which effective processes of change and transformation occur.

I also believe that the quality of the expert's relationship with others significantly influences the expert's commitment to striving to remain open to new experiences and so also the capacity to discover different and diverse meanings. Building positive relationships might be said to act as a catalyst for change with expert practice potentially being open to improvement through actually thinking about the facilitative qualities of various relationships. Conversely, it is possible to imagine how poor relationships might equally stifle options for change and learning and perhaps even lead to resistance to change and resentment, as for example, have been reported with some international development efforts in Africa (Leach, 1991). Therefore, it is important to make clear that in describing relationships I am specifically referring to the *personal* relationships between the expert and others they work with. These are personal relationships in that they are between persons who cannot personally "be exchanged without changing the nature of the relationship" (Duck 1999, p. 124). This is in contrast to *general* relationships where "two partners in an interaction could be exchanged and the relationship would be the same" (Duck 1999, p.124) such as, for example, the general relationship between a market seller and a customer.

As I came to appreciate through my experience and research, a focus upon these interpersonal relational aspects of expert practice again highlights how the expert themselves, personally, must become their own major instrument for practice and also for thinking about and so learning how to relate to others and how to engage with difference. Consequently, again this highlights how expert practice becomes centrally concerned with learning about one's own knowledge and skills reflexively, and their limitations, and how to try to fathom the perspectives, meanings and expectations of others while also trying to reflexively relate these to one's own values and beliefs without necessarily totally overriding those values and beliefs. However, from my own practice experience I also quickly came to understand that forging generative interpersonal relationships, in terms of their quality and character, is similar to developing reflexivity, in that they are something that experts must constantly work upon. They do not just occur and nor can they be established unilaterally, but as I described in Chapter III, they evolve enactively with effort on both sides, over time.

Unfortunately, so much of the Portage literature seems to convey an understanding of relationships in the rather technical and impersonal, general, seller-buyer sense, between the consultant expert transmitting their expert knowledge and their local colleagues who are the recipients of that knowledge. From this technical-rational perspective, practice can so easily become understood as narrowly concerned with the most efficient and universally applicable means by which the 'service delivery device' (the expert) can most efficiently establish the service (Portage) for the 'service receivers' (colleagues and others). These rather linear and technical narratives of reports regarding Portage expert practice do not include the capacity to reflect upon, or even the language to embrace, concerns with the personal and the unique aspects of human interchange. Accordingly, questions about the interpersonal skills of the expert and their ability to mesh with the rich diversity of unique needs of those they work with are effectively ignored. I feel dismayed that even recent Portage research overlooks such questions. Perhaps this simply reflects the present mind-set of the professionals, frequently educational psychologists, who oversee such programmes. Similarly, Hunt, (1987, p. 145) noted that:

"When we consider that each of us engages in dozens of interpersonal transactions every day - formally in our teaching, counselling, and supervision as



well as informally with our colleagues, friends and relatives - it is surprising that there are so few attempts to characterise such events”.

Hunt's explanation for the paucity of interpersonal models for understanding relationships related to the primary focus of mainstream psychology with the 'encapsulated individual' and consequently a failure to consider 'persons-in-relation'. Indeed, as an educational psychologist myself, working within an educational context overshadowed by modernist discourses, I have frequently found it bizarre that while the focus of my expert practice is dominated by concerns regarding the complexities of interpersonal problems such as between individual parents, children and teachers, that the means by which I am encouraged to think about my practice delivery is in terms of a technical-rational (buyer-seller) understanding regarding my own relations with others. As a profession, it seems that we continue to treat the people we work with as clients rather than as persons.

Moreover, while educational psychologists are frequently called upon to share and use their theoretical knowledge of a whole range of educational and psychological topics, there is rarely any reflection upon or research into questions about the processes of actual practice, such as how we go about doing what we do, or why we do it in the way we do. At best 'research' into practice questions tends to be restricted to evaluative questions of the service given and typically measured in terms of hours spent in schools, numbers of children assessed, speed of report writing, etc. Again, technical means are used to evaluate technical practice. Rarely is any consideration given to the reflexive or interactive praxis questions or about the dialectics of action and knowing that I have raised within this thesis despite the general practice emphasis upon intervention and change. In this way, while as professionals our intentions and ideologies may be intended to be supportive to the people we work with, our actual procedural practice, that is how we interact interpersonally with others, may be abusive and oppressive in their implementation as long as we ignore the part that we as experts play in the social systems in which we are engaged and while we continue to fail to adequately theorise these interpersonal interactions.

Reflecting upon questions of expert interpersonal relationships with others, I have come to understand how one of the most significant effects in this transformation from technical preoccupation to understanding Portage expert practice as primarily concerned

with interchange and relational challenges, is that this shift highlights the importance in our practice of communication and specifically dialogue. I previously referred to the significance of dialogue in relation to postmodern thinking and research in Chapter II. Indeed, it may be this absence of any substantial focus on interpersonal relationships within the standard Portage literature, regarding its application to developing countries, that explains why there is rarely any sense of meaningful dialogue taking place between those affecting the change, the experts, and those effected by the change, colleagues and other local people. Rather, in reading the modernist narratives of most Portage reports, change seems to be characterised by monologic prescription. However, I am convinced that if Portage expert practice is reconstrued to emphasise the primary importance of personal relationships then the Portage expert's role also becomes significantly reconfigured to one in which the principal concern of their expertise centres upon creating the context for dialogue.

In fact, when I think about reflexivity, which might be considered a form of deconstructive dialogue with oneself, it seems to be intimately tied to ideas of dialogue and exchange. That is, I have come to understand how making one's own socially constructed forms of understanding 'strange' and so an object of self-study also seems to invite curiosity and questions about the forms of understanding of 'the Other'. This is a curiosity that can only really be satisfied through relationships which encourage dialogue, rather as I believe, to re-quote from Chapter II, Winter (1998b, p. 67) was referring to when he claimed that "thinking in dialogue with others" was an important creative resource for changes to our own thinking and ideas.

I also made reference to this form of thinking as a 'commingling' within the enactive systemic relationship in Chapter IV. In this sense dialogue is understood in terms of relationships that we as experts can enter into rather than as simply a method of practice. Again, this highlights the importance of personal, rather than general, relationships. Dialogue therefore is far more than a specific exchange of questions and answers, "but at heart a kind of social relation that engages its participants" (Burbules 1993, p. 19). Also, as Bohm and Peat (1987, p. 241) described:

"a key difference between a dialogue and an ordinary discussion is that within the latter people usually hold relatively fixed positions and argue in favour of their



views as they try to convince others to change. At best this may produce agreement or compromise, but it does not give rise to anything creative”.

However, if we understand dialogue as occurring when we have established the conditions to think dialogically with others, that is intersubjectively, then it also includes opportunities to highlight the differences and contradictions in our thinking, so allowing a discovery or re-establishment of our implicit assumptions and the extension of our own limited horizons of understanding and thought (Gadamer, 1990). In this sense dialogue is primarily a process, undertaken with others, through which we are able to begin to think about thinking, our own and that of others. Dialogue therefore become an exploratory process, a means of inquiry with others and through which practitioners learn to pay heed to the cultural beliefs, meanings and understandings of others. Moreover, the interpersonal relationships which allow us to establish the ‘arena’ of dialogue may also aid our self-reflexivity in the sense that it encourages us to become critical in our thinking about our own socially constructed worldviews. After all, it is through dialogue with others that we may begin to test out our own prejudices and so seek out different meanings.

Of course, this also echoes the epistemological stance in which knowledge is viewed rather like a conversation, that I introduced as typical of postmodern thought in Chapter II. Understood in these terms, knowledge is not a fixed ‘thing’ or commodity to have more or less of, or something waiting ‘out there’ to be discovered. Rather, it is an aspect of a process which arises relationally out of interaction, so that dialogue is a fundamental characteristic of a dialectic form of knowledge.

So despite the creative potential of the expert themselves thinking reflexively and challenging their own understandings, as I have described in the latter claim to knowledge above, it is surely only when in addition a context for dialogue with others has also appropriately been constructed, that opportunities for mutual learning and for generating new, context sensitive means of supporting families through Portage are most likely to be found. If so, then for the ‘constructionist’ Portage expert a major challenge must become one of working out how to contribute to forging such generative, dialogue rich relationships - relationships from which both the expert and those they work with emerge with expanded potentials for effective practice. It must include ideas about how, within our practice, we open ourselves to a plurality of dialogues and so move the

understanding of those engaged in the dialogue and practice onto different levels of thinking and meaning. By this means dialogue, dependent upon the quality of interpersonal relationships, creates educational knowledge.

Of course, dialogues, as relationships, do not always run smooth, sometimes they go in wayward, unexpected directions, this is their nature, and they do not usually follow the neat rather sanitised pathways often conveyed in the conventional research narratives of practice. This is possibly also the source of their creativity and ability to break the boundaries of our understanding. Consequently, knowledge created through dialogue might be provisional and shifting, as the process of dialogue frequently gives rise to unexpected answers and new directions. But it is this uncertainty and dynamic quality of dialogue which also often carries the thinking and practice of the expert forward. By participating in dialogue, I have, and continue to be, educated and changed in my understanding and in my expert practice. Indeed, within the thesis as a whole, but specifically within Chapter III, I have tried to give an account of how my knowledge developed through shifts in perspective resulting from those educational ‘surprises’ related to my engaging with difference. Importantly, recognising the value of dialogue in my own practice experience and subsequent reflection, also emphasised the value of understanding expert practice from a systemic second-order perspective. Relationships centred upon dialogue would therefore appear to be one of the important characteristics of constructionist expert practice, along with reflexivity, both of which provide the expert with an opportunity to try to avoid some of the limitations of first-order thinking.

Questions regarding interpersonal relationships and dialogue also inevitably raise further questions for the expert about power within relationships, including power which goes beyond that held personally, as I described in Chapter IV. In turn this invites a concern with the ‘pattern of participation’ (Havelock and Huberman, 1977) within the expert-colleague-others social system. In Chapter IV of this thesis, in the second-order analysis of my earlier practice experiences, I also referred to how questions of power were generally absent within the Portage literature, but how I believed that these questions were pertinent to reflective expert practice. Given that power is most often exercised in relationships, then a consideration of interpersonal relationships may also represent an opportunity to address these issues.



Thinking about my own practice experience and the asymmetries of power, I can recognise that although effective dialogue, that which is generative, does not require equal power relationships, it does require some reciprocity and respect for others, as well as conditions in which they are able to freely contribute, without undue hindrance to the ongoing collaborative conversation.

Certainly regarding my experience within Namibia, I am aware how the shifts in power might also have been described to have paralleled the shifts in the nature and quality of my relationships with my colleagues and the degree to which we had more or less established collaborative dialogue. Initially, I think it is fair to say that the power balance appeared to be very asymmetrical, with my colleagues seemingly investing considerable authority in my expertise and viewing their role as far more passive in terms of suggesting changes to Department Three, a situation I believe I colluded with given my own uncertainties for appropriate action. However, as we developed improved interpersonal relationships, coloured by trust and co-operation and coupled with my increasing reflexive awareness, this seemed to open opportunities for far more generative dialogue and, I believe, led to any power being far less centred on my own Western knowledge. Importantly, I think that this was also reflected in a greater degree of equality, reciprocity and mutuality in our interpersonal relationships. Again, it is in this systemic, constructionist understanding of expert practice that our view about our colleagues begins to shift from them being seen as objects to be changed and improved to that of equal subjects within unfolding relationships. This is the view which recognises how it is our sociality that is the basis of our communication and dialogue.

As I shall also describe below, reflecting upon my own experiences, I am persuaded that when consideration is given to the complex issues of dialogue and power in interpersonal relationships, that this may help to ensure that expert practice continues as an exploratory and generative learning activity. Indeed, these elements in the process of building relationships are vital aspects of ensuring that experts who are beginning to engage successfully with the difference of others, also account for the power of their own Western knowledge system.

Clearly, this interpersonal relational understanding of Portage expert practice, which is underscored by reflective reflexivity and dialogue taking place throughout practice, can

also create a very high degree of uncertainty for the expert. While my understanding of the processes of interpersonal relationships does not require that experts relinquish control altogether, they do need to do more than only pay 'lip-service' to sharing control, but to also actively think about and effectively practice that sharing. This is always likely to be very challenging for Western-minded experts in particular, as given the indeterminacy of relationships, especially within the context of cross-cultural exchanges, it is likely the expert will not know what new meanings and understandings regarding Portage might emerge. Furthermore, in contrast to the conventional instrumental narratives of Portage expert engagement, a systemic understanding of Portage expert practice emphasising interpersonal relationships and dialogue is not one that can simply be applied as a set of bounded activities or through formulaic techniques for practice. When we see Portage expert practice as the fostering of relationships for dialogue, while there are certain ways of thinking about our practice which might be more or less helpful for promoting conditions for interchange, there can be no fixed methods. Rather, experts need to appreciate that they too, personally, are fully part of the system in which change is sought.

Additionally, the relationship experts have with those colleagues and others they work with, is not just something which eases the progress of expert intervention so that they can get on with the job of change. The relationship is a living, continuous dynamic which is importantly integral to the whole business of expert engagement and change. So rather than a recipe to be followed mechanically there should be a diversity of shifting ways or 'vocabularies' of thinking, which change as the dialogue itself alters and this complexity of understanding is itself of value. Although originally applied to the practice of ethnographic research, I have found that the analogy suggested by Ball seems to aptly capture the uncertainties, the very personal engagement, and the importance of interpersonal tact called for by a constructionist and interpersonal understanding of practice, when he claimed it was more like, "going on a blind date than going to work" (Ball, 1993, p. 33, quoted in Usher et al., 1997, p. 222).

Of course there was an added potential problem to fostering interpersonal relationships and dialogue within Namibia, in that with our language differences and difficulties it might have been expected that the conditions for establishing effective dialogue were not ideal. After all, it was not a context where there was the free and natural flow of



conversation such as that which takes place between native speakers who share a common language. Yet conversely, as I have previously described in this thesis in relation to my practice transformations and issues of power, I believe that it may have been these very conditions which helped me personally to first focus upon the problems of dialogue and to consider how to foster improved interpersonal communications.

Working in a context where most communications had to be interpreted; where careful consideration had to be given to construct ideas into utterances that one had learned from recent experience and listening might match the different or limited English vocabulary of colleagues'; where much re-checking was necessary to try to ensure ideas had been conveyed as intended; and where I had to ask many questions of others to ensure I had understood their meaning, meant that all of us involved necessarily had to give very close attention to each others conversation. Moreover, these were conversations in which far less could be taken for granted, in which attentive listening was a necessity, and where both the listener and the speaker had to learn to adopt and to reflect an attitude of respectfulness. No less important, it was also a context in which misunderstandings were very many so that humour, a great catalyst for the successful forging of relationships, came to also characterise some of the interactions between my colleagues and myself. Perhaps above all, these were conversational contexts in which a great deal of patience was demanded and where it was necessary to reflect - and time was available between individual contributions to the ongoing conversation to do so - deeply upon one's own use of language and ideas as well as the language and ideas of others. Under such unique circumstances it became very possible to begin to try to understand a sometimes different horizon of thinking that was not my own, but to do so in relation to my own.

I think that this immersion into the complexities of interpersonal exchange also underlined how fruitful dialogue depends not only on the spoken word but just as importantly on the stance and the attitude of respect, affection, trust, hope, appreciation and tolerance, taken by all the parties involved (Burbules, 1993). I believe when we understand relationships in these terms this then can bond us to the process of dialogue in which we try to step inside the language of others and to try to make an understanding of it on their terms and to then see it in relation to our own before we add to the ongoing conversation. This means that we importantly must not only ask questions of those we

work with but also create the space (Fine and Turner, 1991) and support for them to answer as I also referred to in Chapter IV.

By these means I believe we might then begin to establish a dialogue in which people with quite different points of view, even modern and premodern, discover ways to converse together and listen to each other more generously and so make sense together. That is, I also think that people generally, and indeed also experts themselves, often do not always know what they think unless others are willing to ask about it and listen. In this way we may avoid any talking down to others, or past them. This of course does not necessarily lead to people thinking the same, or that some measure of consensus is naturally the goal, but it may help conceptual shifts to occur. Viewed in this manner, the Portage practitioner's expertise is not one in which they are a 'change-agent' as I described above, a phrase so popular in applied educational psychology, in which they practice so as to cause other people to change. Rather, it entails inviting, creating, and sustaining space for and facilitating, a process for collaborative relationships and dialogical conversations to emerge through which change may occur mutually.

#### **6.2.4. Change Through Exchange**

Drawing upon my own experience, I believe that genuinely reflective and reflexive Portage expert practice and a focus upon the processes of interpersonal relationships may ensure that expert practice also fosters reciprocal processes of exchange, leading to more ethical, educational and practical change in which new ways of seeing and understanding may emerge.

Throughout this thesis, in terms of my analysis of the Portage programme as it is conventionally understood, I have considered how the programme largely displays the hegemony of a modernist metatheory and specifically behaviourist theory. I have described how a modernist understanding of Portage also implies an inherent assumption of expert practice as, despite some minor tweaking with regard to the specifics of cultural context, essentially a transcultural and unidirectional process. Consequently, Portage expert practice, certainly as it is described in most of the research literature, seems to reflect a desire for normative goals of change and an insularity from issues of reciprocity and mutual learning. Unfortunately, as I have discussed in Chapter V, such an understanding of the role of the expert can in effect lead to greater forms of colonial



practice. That is, in failing to adequately and reflexively analyse the dominant and cherished notions of Western expert knowledge and skills concerning Portage, expert practice can be rendered insensitive to the lives and meanings of those for whom its prescriptions and proscriptions may not match.

In contrast, I have come to appreciate an alternative understanding of Portage practice in which interchange becomes central. In regard to the details of the transformations of my professional understanding of Portage and expert practice within Namibia, I have described how the effects of culture may be seen as not simply providing a context of variation to which Portage must be adapted before it is adopted. Rather, culture can be understood as providing a rich generative location for the production of different indigenous meanings, values, beliefs and psychological processes which may challenge the universalist ontological belief of Western science and the professional disciplines which drawn upon that belief. In these very different terms, culture is understood as having a constitutive role and an integral part of peoples' development and thinking rather than acting as simply some 'background variable' adding different shades to assumed universal concepts such as those regarding childhood, disability, etc. In this social constructional sense, localised socio-cultural processes are said to authorise 'the way things are' and not the other way around.

From the beginning of my appreciation of a social constructional perspective to understanding expert practice, I started to more readily question this modernist metatheory, and the empiricist-technical tradition of Portage practice and importantly to also begin to see different cultural contexts as sources of new learning for all who are involved in the process of change. Furthermore, I have valued how this systemic perspective, which embraces many contemporary postmodern ideas, also potentially enables the expert to appreciate how their own cultural heritage acts simultaneously both as a means by which experts themselves might be said to have been colonialised, while also offering a rich source of ideas and the means by which experts construct their own worlds. That is, embedded and embodied as experts are in their own socially constructed cultural traditions, they are inevitably the hosts of their culture's ideas and theories. It is these theories which both emerge from and construct our expert lived experiences and so also our realities (Gergen, 1999). Consequently, from this social constructional perspective it can be argued that without effective reflexivity and constructive dialogue

between both our own selves as experts and others that we interrelate with, we may risk being left with our own expert theories, effectively talking to ourselves when we engage with others who host different theories and constructed realities. In effect, our expert ideas may be rendered irrelevant to the different lived experiences of others we have sought to engage with in the processes of intervention and change.

However, I believe that in such circumstances that there is another danger, beyond simply our ideas being irrelevant locally. I think that this danger was clearly evident, for example, in the rather derogatory comments made towards local people within some of the Portage reports that I referred to in Chapter I (e.g. Kohli, 1988a; Zaman and Islam, 1988). The risk is that those who hold different understandings of the world and who do not share our expert views or who do not match up to our professionally validated and Western norms for living, may become labelled as miscreants, problematic, or underdeveloped, all of which serves to reinforce negative and deficit views about the other so that the potential wealth of their views become submerged under our expert imperatives.

The questions that I have asked of myself regarding my practice include, how might these possibilities for irrelevance, colonisation or pathologisation be challenged? How might we as Portage experts, together with others, begin to learn new and become more appreciative of different ways of understanding the world and so construct new forms of practice skills and knowledge? As I have discussed above, a social constructional understanding turns our attention to the need to question our own expert intentions and underlying practice epistemology through reflexivity, as well as highlighting the need to attend to and to be responsive towards interpersonal interaction and importantly to the conditions of dialogue. I believe that under such critical reflection it is most likely that the expert may then be best prepared to begin to construct the reciprocal relations necessary for mutual learning. That is, just as it is through relationships that we construct our worlds and all that we take to be true, real, of value and worthwhile, so it is that through relationships and specifically dialogue which is open to interchange and full participation, that as both experts and others, we may begin the process of reconstructing the world.



To stress an important point, I believe that it is not only through carefully considered interpersonal relationships that the expert may begin to sensitively *share* their skills and knowledge, but more significantly within such a context we may begin the process of generating *new ways* of seeing and new ways of thinking. At the very least, developing such a stance may help to ensure that while we retain our own views and beliefs we also remain open, appreciative and respectful to the diverse and different views of others. Indeed, perhaps it is the case that the greater the cultural differences, the more formidable the practice challenges, but also the richer the potential educational rewards.

In this sense the dialogue of interchange can be seen as conducive to new growth fostered by the personal value confrontations, communicative challenges and interpersonal problems of interchange. I am certainly aware that my own transformation in expert thinking to the position where I began to also learn from my Namibia colleagues and their different ways of understanding family life, etc., was not a smooth process. As I have described in the previous chapters of this thesis, this shift occurred enactively over time as I grappled with the uncertainties of the new context I worked within and as my reflective and reflexive practice abilities improved, spurred on by the challenges of the interpersonal relationships with my colleagues and others. Out of my isolation from my home culture and due to my ‘vulnerability’ as an expert who was culturally out of his depth locally, my colleagues necessarily became important partners in the process of change for me, as well as of themselves and the Department. They no longer represented the ‘pathologised’ community/culture in need of saving by an injection of Western wisdom, but became part of a joint endeavour as we all learned to tread the tight-rope of change, sometimes feeling confident in what we knew or thought we knew, while on other occasions feeling off-balance and unsure of our position and disempowered by our uncertainties and the complex challenges of the route ahead.

As I have also described, what emerged from my practice experience included a new understanding of Portage as primarily a vehicle for engaging families positively and for assisting them to develop their own interpersonal relationships with their children with disabilities. This was not how I had understood Portage prior to my arrival within Namibia, nor is it how Portage is primarily understood and described currently within the Portage literature. Likewise, I believe that it was not how my colleagues had previously understood their role prior to our joint venture of changing Department Three. They had

originally understood themselves, or aspired to be, teachers whose task it was to teach 'mentally retarded' children academic skills.

Equally, as I have explained, the behaviour of families towards their children with disabilities had for the most part not traditionally included engaging them in formal educational or social interactions. However, following their participation in the Engela Portage Programme the families, to various degrees, did appear to change their behaviour towards their children, just as we as a Department changed our own expectations of what families might be expected to do as part of the Programme. In this sense what emerged from our working together, from the interaction of different cultures and constructed realities, was a great deal of reciprocal learning and a new vision of Portage, one that none of us could have anticipated at the start of our collaboration, but which was meaningful locally.

While I can not speak for the further changes regarding the professional lives of my colleagues, for myself this experience also heralded further profound and generative changes in how I came to rethink my wider practice as an educational psychologist and the desire to research into that practice and to view that practice very differently. My understanding of my practice, which I had previously understood restrictively as that which I did while delivering my knowledge and practising my skills, broadened to encompass an awareness of how my practice methodology included questions about my values, epistemological position, etc. It also included questions about how I put these values and beliefs into action in the course of my practice and also in my attempts, evident in this thesis, to contribute to a professional body of knowledge and my work as an educational researcher.

In terms of thinking about and reflecting upon my transformations of understanding expert practice and Portage and those challenges to my natural assumptions about both, I have been curious as to why such dramatic changes particularly begun within Namibia. Within the latter claim to knowledge I referred to why I had come to appreciate the significant importance of an interpersonal understanding of expert practice and particularly in relation to the creation of conditions for dialogue, as these opened the possibility for a kind of commingling of consciousness and of generative and creative thought arising. But why should this have been so? How does dialogue and interchange



help to seek out new and different meanings which might allow experts and others to test out their own prejudices and constructed realities ?

Researching the social constructional literature, various authors have also referred to how communicative relations can co-construct new orders of meaning from which new forms of action might emerge (e.g. Gergen and Kaye, 1992; Shotter, 1993a; Shawver, 1998; Gergen, 1999). Social constructional theory seems to explain the generative potential of interchange and dialogue as possible due to the fragility of meaning. The theory suggests that since meaning is a human construction, delicately forged within ongoing patterns of co-ordinated action, it is therefore always open to transformation. This transformation may begin with any other form of action, such as experimentation, that falls outside the reiterative patterns of daily life and, in my case within Namibia, outside of my previous expert practice experiences. It may also stem from novel and new arrangements of communication, and new forms of dialogue, which invite exploration of the overlooked, the forgotten, or the other as our own ideals are juxtaposed with very different ideas. In my own experience within Namibia, I think it was the sometimes very wide discrepancies between my views and those of my colleagues' which created the orthogonal interactions (Maturana, 1988) I described related to my shifts in understanding in Chapter IV and perturbations in our respective 'networks of conversations', which generated a unique beginning and a sense of radical otherness. In this way, once we step outside of our usual patterns of thinking and action we may begin in many ways to open routes toward the generation of new orders of meaning. Consequently, as our taken-for-granted and culturally constructed worlds are transformed, so we are also invited into potential new domains of action.

Preferring a less cybernetic concept of change than Maturana (1988) proposed, Shawver, (1998) referred to the concept of 'paralogy' from the works of Jean Lyotard to explain this generative potential of dialogue and interchange in which new meanings emerge. According to Shawver, Lyotard argued against the conversational quest for consensus as posited by Jurgen Habermas, but rather claimed that paralogy entailed the ongoing creation of meaning when something one conversational partner says actively inspires others to say something in return and so forth. This pattern of dialogue and interchange becomes generative by leading to new ideas caused by the 'breaking down' of cherished

ideas and theories previously unquestioned by the conversational partners engaged in this form of paralogical dialogue.

Clearly, such an exchange is more turbulent than a striving for consensus would suggest. However, Shawver (1998) stressed that dialogue that became polemic would probably undermine the creativity of exchange as the parties involved would most likely become too defensive and so less open to shifting their positions. It should be emphasised that within paralogical dialogue, it is not necessarily that people begin to think the same, so much as that conceptual shifts begin to happen which leads to co-constructed creative change. Under such conditions we may then begin to break the grip upon us of our various, already established, expert and Western forms of life, with their associated regimented ways of talking and conventions of significance, so that we become more open to seeing other possibilities.

Perhaps, in this paralogical sense, dialogue can avoid falling into the trap that seems to characterise traditional Portage and cross-cultural research and also traditional anthropological inquiry (Clifford and Marcus, 1986) in which 'difference' is made intelligible in the terms of one's home culture so that the other is inscribed in ways that allows experts to say that they have reached a definitive understanding. Rather, the modernist tendency of rendering the other intelligible may be contrasted with one in which expert practice seeks to alter or expand the home intelligibility through a fusion into it of a different mode of understanding. Indeed, given that we see many examples of how this creative fusion seems to have already occurred within architecture, music, food, religion, etc., between the West and other parts of the world, why should this not also take place regarding our understanding of topics related to expert practice associated with psychology, education and disability? Perhaps the difficulty for Western psychological and educational knowledge and practice is that for the most part, as I have described, they are strongly associated with science and are therefore effectively seen as unassailable, or superior to 'other' ways of assigning meaning.

Yet within the West we are witnessing some shifts in the hegemony of modernism and science, certainly within the field of educational research brought about by the challenges of postmodernism. Although social constructional ideas and postmodernism generally are viewed as sceptical conceptual positions and as promoting attacks upon



science, these conceptual resources may increasingly bear more generative fruits and offer new ways of talking and writing between people who do not necessarily share an allegiance to the same school of thought.

As I have tried to describe and demonstrate within this thesis, for the constructionist Portage expert, a further challenge must therefore be that of generating such infusions of intelligibilities in terms of understandings of expert practice, child development, disability, etc. In such practice, the means by which similarities and differences are explored need to be found, and additionally, ways towards a more constructive practice through the addition of non-Western concepts so that the possibility of developing more culturally grounded and locally useful forms of knowledge emerge. I do not believe that this implies any abandonment of our own Western expert theories or constructed realities. The aim should not be to generate a set of mutually exclusive culturally based orientations that fail to regard or appreciate the alternatives. Rather, this is about thinking how to generate and incorporate into our practice orientations ways of working with others that reciprocally exchange, intersect and interpenetrate cultural and practice differences and erode our own professional solipsism so rendering our practice more educational for all (expert included) and, in doing so also ensure the greater practical relevance of our practice to the unique local context in which it is applied.

I have also claimed that such transformations in expert practice associated with change through exchange may lead to more ethical practice. As I have commented upon above regarding dialogue, ultimately the issues of interchange and cultural interface cannot be separated from matters of power. Thinking about issues of expert practice as concerned with interpersonal relationships, as I described in the latter and the present claims to knowledge, with the calling forth of a consideration of patterns of participation in dialogue, also highlights how expert practice is never just about the application of value-free and objective techniques. It is also crucially about questions of ethics, and about the respect for different worldviews and recognising and questioning the interplay between one's own and other's values and beliefs. It is ethical in the concern it has that how we go about our practice is more important than simply getting to some end point. As Portage expert practice is about acting in relation to others, then it follows that through considering the importance and processes of relationships, ethical questions become pertinent to the methodology of such practice.

Reflecting upon my own shift in understanding Portage from the technical to the relational, I can appreciate how this change invites the Portage expert to reconfigure many of their practice ideas and to re-value the input of their colleagues and others in the process of change. In this sense it introduces the idea of the 'ethic of participation' (Hoffman, 1993) to which I shall return to below. Above all, this reforming of practice theories and thinking about Portage helps to undermine the predominant view of Portage practice as technological and objective with the expert as the key authoritative and arbiter of outcomes. Again, I believe that the shift is one which encourages practice to be understood as a more collaborative endeavour, a relationship of dialogue, between all involved with the Portage programme, with greater respect for those we as experts work with so that we begin to view them as experts in their own right who can also be key architects in devising their own 'solutions'.

Lather (1991, p. 163) seemed to put this succinctly, in claiming that such practice:

"means asking ourselves hard questions about how our interventionary moves render people passive, positioned as potential recipients of predefined services rather than as agents involved in interpreting their needs and shaping their life-conditions".

If we as Portage experts are to enter into the kind of interpersonal, dialogue rich relationships that I have argued for, then it is first essential that no single conceptual paradigm can be assumed to be dominant, including the modern or the postmodern. Taking this position is to invite a certain humility on the part of those involved in the relationship. Should Portage practitioners fail to appreciate the limitations necessarily inherent in their own local paradigms and treat the alternatives as flawed or inferior so necessitating Western improvement and enlightenment, then potential conflicts of worldviews and cultural understandings related to such colonialism are unlikely to give way to more ethical and productive dialogue and practice. If however, relationships and constructive dialogue can be established, not only is Portage expert practice more likely to be ethical, but also practical and educational benefits become more apparent as the different meanings and constructed realities of the expert and others interface, with their various cultures offering to each other an expanded and rich array of resources.



In this way I believe that it is through moving towards a more constructive expert practice which acknowledges, explores, values and learns from other cultural traditions, that the international Portage movement as a whole can benefit. To reiterate, thinking about practice differently in the terms I have described is itself to begin to practice differently. It is this alternative understanding of the status of those we as experts work with which invites alternative forms of expert action and of Portage, so that in effect theory, both informal and formal, in its intimate relationship with practice becomes a practical device for new and further constructions.

#### **6.2.5. An Alternative Theoretical Framework For Thinking About Portage Expert Practice**

In my first claim to knowledge, I described how I believed that embracing a postmodern understanding of practice, and particularly by drawing upon social constructionist, systemic ideas, might usefully challenge the technical-rationality inherent in much of the literature related to Portage and expert practice. Indeed, in terms of the nature of my research approach and the analysis of my practice experiences both within Namibia and subsequently, I have particularly aimed to exemplify how a postmodern stance, with its epistemological, ontological and methodological implications, can provide an alternative perspective to the modernist paradigm. It has been my view that postmodern ideas generally and social constructionism specifically, potentially offer Portage experts a further and new conceptual constellation for guiding their professional work related to the process of change. I have also found that they both provide a rich mine of ideas that stimulate thought and have challenged me to think about many issues of cross-cultural exchange and the transfer of ideas from one context to another. I am not aware of social constructional ideas previously being applied to understanding Portage and this thesis therefore also aims to bring social constructionism into the field of Portage and Portage expert practice.

As I have described, social constructionism is often referred to as a 'method' of postmodernism, one which embraces the importance of reflexivity in practice, an appreciation of the importance of considering interpersonal relationships between expert and others, the crucial value of dialogue and interchange to these relationships as well as the human reality and the systemic presence of the expert. Indeed, in Chapter IV I also demonstrated to the reader how the 'method' of social constructional and related

contemporary systemic ideas could be used to usefully think about my own expert practice experiences within Namibia beyond the largely first-order and more conventional descriptions provided within Chapter III.

In Chapter IV I also outlined a description of social constructionism, although it should be clear to the reader that I did not intend to imply there is any single theory of social construction, nor that there is a set of prescribed constructionist techniques or practices that experts might learn and then apply. Rather, social constructionism might be said to be characterised by a group of suppositions that are potentially generative in their implications for Portage expert practice primarily through facilitating reflexivity and dialogue. In this sense social constructionism might be more accurately referred to as a meta-theory that allows experts to consider how other theories they use develop and are, or could be, applied in practice. I think that this is achieved by social constructionism adding a further descriptive story of expert practice, and so offering an alternative and even a potential liberation from a totally technical rationality. As I found, social constructionism by encouraging a greater tolerance towards other 'realities' may help Western Portage experts in particular to recognise the existence of other knowledge systems and ways of thinking, in which they might subsequently find alternative rationalities to guide their practice away from the currently predominant mechanistic and reductionist ways of thinking about practice. Indeed, social constructionism seems ideally suited towards addressing the challenges facing Portage and other experts who are working towards innovative educational change within cross-cultural contexts.

However, as I understand, social constructionism offers much more than an alternative view of practice. As I have described, social constructional ideas, such as those embodied in systemic practice with their emphasis placed on the pragmatics of language, suggest that theories of expert engagement need to also recognise and take account of the moral and political questions that are central to expert engagement. Given the emphasis on the importance of meaning generation and exchange, the constructive expert is likely to be more aware of how certain meanings can take precedence over others which they subsequently displace or submerge from the ongoing conversation thereby potentially stifling practice creativity and new learning. As such, I believe that expert practice which is mindful of social constructional ideas is more likely to remain open to a critical



analysis of the expert role and influence while appreciative of the different meanings of others.

Consequently, a social constructional perspective would appear to also offer a ready framework in which to encourage and enable the Portage expert to reconsider that which they may have taken for granted and so question dominant and conventional forms of practice, as I have described in relation to my own practice. In writing about my own practice and practice changes, from a constructionist perspective I have tried to exemplify the constructionist understanding that all forms of practice smuggle within their premises particular values and assumptions, such as privileging the notion of individualism over collectivism. It is the raising of these essentially ethical aspects of practice, the importance of which I also referred to above, which I also find most refreshing and attractive about social constructionism.

While critics of postmodern and social constructional ideas claim that the questioning of foundational values inherent in these conceptual perspectives can lead to nihilism and an undermining of even emancipatory values, I have found that in contrast ethical questions and transparency become central aspects of expert practice which draw upon social constructional ideas. Moreover, as also described by Cecchin et al. (1994), social constructional ideas appear to more openly raise ethical practice questions which are usually absent from conventional technical-rational views of practice in which the expert is often assumed to work objectively and rationally, so countering the subjective influences and biases of their personal prejudices and values.

Clearly, social constructionism, perhaps in contrast to more emancipatory orientated expert practices, does not argue for a single or absolute ethical position, and it challenges the belief that there might be a transcendental ethical reality. Rather, it proposes that as social beings we exist in a multiplicity of realities with each formed and maintained by our networks of conversation. From a constructional perspective therefore, ethical concerns are not single, static ideals but multiple and shift with different domains of reality. Although constructionist experts work ethically, recognising the important orientating place of values within their practice, they also remain mindful of the potential oppression aspects of their own ethical standpoint, and even those most deeply held

personal values are understood to be contingent, at best only locally and temporarily relevant, and therefore in need of constant questioning and challenging.

So with its emphasis on collaborative conversation and mutual dependency, social constructionism leads towards an ethical stance in which a prominent concern is the development of a sensibility to the views, feelings, beliefs and values of others and a concern with the actions of professionals and the consequence of their actions for the different understandings of others. Therefore, it could be argued that it is the willingness to undergo and risk change such as through acknowledging and appreciating the different values of others that is the ethical essence of social constructionism.

Moreover, with social constructionism being suspicious of fixed norms and its appreciation of context it seems to encourage a notion of situational ethics, in which ethics are recognised to vary with context and circumstances. Related and building upon an appreciation of situational ethics and with its focus on collaborative conversation, social constructionism also appears to promote an 'ethic of participation' (Hoffman, 1993). Indeed, regarding second-order systemic practice, Maturana (1988, p. 73) suggested that a question of ethics, that is a concern with "the consequences of the actions of some human beings upon other human beings" should ultimately be at the centre of all human action.

Viewed as such, all expert practice becomes essentially a moral endeavour, with claims to a neutral and bias free expert position being understood as untenable. Therefore, the social constructionist inclined expert recognises that their socially constructed values, prejudices and ethics play an important part in constructing their view of the world but also in the positioning of the expert so that they are open for further reflection in the course of collaborative practice. This overturns any striving for ethical neutrality, but rather acknowledges:

"multiple partiality, taking all sides and working within all views simultaneously...always evolving new interpretative positions as a result of dialogical communicative action and the resulting, changing realities" (Anderson and Goolishian, 1988, p. 385).



In addition to finding that the conceptual resources of social constructionism provide a useful means to reflect upon and analyse my own expert practice, as I described in Chapter IV, I have also found that they evoke a range of helpful ideas for thinking about practice processes which I shall describe below. I therefore believe that these ideas regarding the processes of practice also have potential implications for practice which might help Portage experts to guide their practice so as to become more open to the plurality of dialogues and so move their practice onto different levels of thinking and meaning which generate creative change, that I suggested above would be necessary for the constructionist expert. Clearly, as many of these conceptual theories and related ideas of practice have evolved within professional contexts with sympathies towards a postmodern epistemology, I also believe that they are likely to be especially appropriate for experts working within a cross-cultural context where engaging with difference represents a fundamental challenge to expert practice.

*A Range Of Systemic Practice Conceptual Tools For Constructively Reflecting Upon Expert Practice*

Some of the hypothetical processes I describe in this section are often referred to in the literature related to contemporary systemic and reflexive expert practice, that which is often conceptually aligned with social constructionism, and they are frequently also associated with professional practice that takes place within a therapeutic context, particularly that of family therapy. While the relationships that Portage experts have with their colleagues and others are generally not therapeutic, nonetheless there are some similarities. For example, as I have argued above, our expert relationships are always characterised by social processes regarding expert and 'client' exchanges aimed towards change or a desire to do something different. To this extent the systemic therapeutic context also shares some similarities to my own views of Portage expert practice and my own experience, in that the emphasis of my practice within Namibia also shifted to a concern with relationships, rather than primarily technical action. As with psychotherapy, my practice became focused upon questions and thoughts about how people, experts, colleagues and others, can best work together to understand how to proceed, a crucial aspect of expert engagement which I have claimed seems so often to be overlooked by most of the Portage literature.

Interestingly, systemic therapy is also usually considered to be concerned with shared meaning systems within groups of people, and as I have described, thoughts about such

meaning systems also shaped my own expert endeavours while I worked with colleagues to develop and implement the Engela Portage Programme. Perhaps a further reason why I have found the ideas of systemic therapy so useful for thinking about my own practice, and why I believe that they may be useful for Portage experts working in cross-cultural contexts, is that therapists also usually have to deal with the vast complexity in relationships as well as the emotional demands that this places upon themselves when engaged with people and with difference.

However, where my understanding of these systemic concepts as applied to expert engagement with Portage implementation differs importantly from those related to therapy, is that unlike in the therapeutic relationship, I was not positioned so as to use my expertise to encourage my colleagues to generate new understanding that might then help *themselves* overcome *their own* particular personal problems. Rather, I was attempting to use my expertise in order to contend with *our shared* problems related to change and improvement. As I have described, these shared problems essentially consisted of questions about the nature and direction of change within Department Three and later the Engela Portage Programme. This was not just a context, as in therapy, in which my colleagues came to me to discuss their problems and ideas, but was also one in which *together* we both made some joint commitments towards action and then collaboratively implemented that action. To this extent, my relationship went far beyond that which usually limits the scope of most therapeutic relationships.

Finally, the conceptual practice processes and ideas that I have become familiar with through my reading of second-order and systemic research and practice literature and which I describe below are clearly not exhaustive, but they include those ideas I found most useful in regard to thinking about my own practice experiences. That is, I have found these hypothetical practice concepts helpful in both retrospectively framing aspects of my own shifts in practice to a more relational and interpersonally concerned reflexive way of working with my colleagues and others, and for thinking about aspects of my present practice. As I have claimed, most of these ideas are related to social constructional theory, although strands of earlier systemic approaches also coexist alongside these as they share an interest in language, dialogue and collaborative engagement.



### *Hypothesising*

I first came across the concept of hypothesising through the psychotherapeutic literature related to the work of Cecchin (1987). Used in the systemic sense, hypothesising is distinguished from the conventional scientific understanding of an hypothesis as an idea to be proved or disproved. Rather, systemic hypothesising is concerned with the formulation of ideas and thoughts about expert practice, including how to go about resolving presenting problems, etc. These practice hypotheses are not taken to be objective truths, but rather to be judged as either more or less helpful ways of thinking about particular ways of working and the problems that expert practice has to contend with.

I have described in the 'Planning Stage' of my first-order account of the Engela Portage Programme in Chapter III, how the initial ideas for change within the Department were essentially the product of my own hypothesising about how we as a Department might proceed. In part, these ideas emerged following a period of 'information gathering' and also from discussions with my colleagues. However, at that early stage, before my colleagues and I had come to develop what I would describe as a more constructive collaborative relationship, that collaboration, as I have claimed, remained fairly 'two-dimensional' and centred largely on technical action steps that we might take. Nevertheless, as I also previously suggested, for most experts, hypothesising of the sort in which I was initially engaged is presumably a constant process that begins whenever we focus our professional gaze. Indeed it is probably impossible to respond other than to think through our accumulated ideas that form our assumptive worlds. In essence, this sort of hypothesising is effectively no more than the process of making an informed guess, expert intuition, usually on the basis of partial and incomplete information, coupled with assumptions from our own professional models by which we problem set (Schön, 1991). As such hypothesising as a concept is similar to Schön's idea of reflection-in-action. It is this form of hypothesising that I think probably most frequently influences how experts begin to set about professionally practising, although this 'diagnostic' hypothesising about ideas for change, despite being fundamental to most professional practice, appears to be rarely scrutinised in the international Portage literature or technical narratives of expert practice generally.

Reflecting upon my own practice while working at the Engela Training Centre, I am aware that I effectively hypothesised at various different but interrelated levels. There was the level of diagnostic hypothesising, which I have described above, related to the manner and direction of my practice based upon my earlier understanding of my role. My diagnostic hypotheses stemmed largely from my own training and professional experience, as I have described in relation to an analysis of my practice in Chapter IV. Concerning this level of hypothesising, Hoffman (1993) suggested that in most cases the actual type of intervention that the expert chooses, usually stemming from their particular professional philosophy, probably preceded the formation of their practice hypotheses, of which the latter become simply a post-hoc justification for the favoured form of action. I certainly believe that this may have been the case regarding my own hypotheses about the development of Department Three. As I have described, on reflection, I am convinced that my hypotheses for change were themselves shaped by my familiarity and knowledge of Portage, a form of behavioural intervention which readily matched my professional understanding. Seen from a social constructional perspective, problem identification could also be viewed as a form of tacit agreement within a particular epistemology to make sense of our expert 'observations' in a particular way, and thereby to make legitimate our own particular favoured courses of action.

However, certainly later, as my understanding concerning my role shifted and became more reflexive, I can recognise that there were further levels to my hypothesising that began to emerge. With my greater familiarity and awareness of my colleagues' understanding coupled with my opportunities for reflection and reflexive consideration, I believe that the later hypotheses I used became far more relevant and appropriate to the local context. That is, they became increasingly more systemic. This was my hypothesising about our relationships rather than about technical action. Thinking about the manner in which this systemic hypothesising unfolded, and reflecting upon Launer's (1997) ideas of hypothesising, I believe that this too might be differentiated. For example, at one level I found that I was thinking about communication concerns, such as my suspecting that my colleagues did not share my understanding of the meaning of teaching goals, due to our language and cultural differences. This in turn led me to generate ideas for helping to overcome these problems. At a broader level of hypothesising, I began to think about wider relationship patterns, such as wondering if my colleagues were hesitant about abandoning the need for families to formally record



their children's progress on the Activity Charts because of their faith in the supposed superiority of the original Portage model.

These types of systemic hypotheses are less rigidly constructed or defended in practice than is usually the case for the more formal notion of hypotheses, as might be employed in conventional theory generating research, or even in more formally planned professional interventions which have clearer, prefigured goals to achieve. Indeed, my presence within Namibia primarily as a practitioner allowed me greater flexibility in shifting my hypotheses. Researchers in contrast tend to have pre-formed hypotheses for which their funded field studies are a means of refuting or verifying. I set out with no such clear commitments or expectations. While a conventional researcher might have been primarily interested in testing the applicability and usefulness of the Portage Programme in a 'developing countries' context (e.g. Oakland, 1997), I was initially far more concerned with developing effective change through using the Portage programme as an intervention.

I was also personally less concerned that my hypotheses about my colleagues and my relationship with them were proven correct. Rather, through my shifts in understanding and practice, when I began to recognise the role of my hypothesising in my practice and to reflectively think about the implications of my hypotheses, I came to view these hypotheses more as a means to open conversation and to maintain dialogue. I realised that they represented my conceptual tools to consider new ways ahead for the Programme and my practice. That is, I realised that I inevitably had to acknowledge and share my thinking, my hypotheses, about ideas for change, the meanings I concluded my colleagues might hold about certain issues, etc., so as to test their reactions to these hypotheses, ideas and provisional conclusions. Hypothesising, in this sense, might be viewed not as a process by which one searches for the best hypothesis that fits the system within which one is working or 'observing'. Rather hypothesising becomes useful in revealing expert ideas and as a description of the expert's prejudices. It is essentially a disclosure of the reflective process.

In this way I think that my hypothesising, which might also be called the silent inner dialogue I had with myself, was less readily trapped into become a private monologue in which I became too pre-occupied by one particular idea that seemed 'right' about what

my colleagues thought regarding some issue. Although initially systemic hypothesising is probably almost always a solitary process of reflecting, drawing upon our previous experiences, beliefs and values, together with the information we have at that time, ultimately to be useful this must be brought to a collaborative context through which it might again change as part of the hermeneutic cycle. Therefore from a systemic perspective, what becomes of interest and concern is the exploration and observation of the interactions between the prejudices of the expert and that of their colleagues and others in the systemic conversation.

As such, practising hypothesising of this kind might also be viewed as an instrument that helps to connect to the task ahead. Sharing a hypothesis with colleagues may therefore prove a potentially useful strategy, in both ensuring that it is recognised simply as a provisional framework in which to approach a problem and also as a means to help to challenge or shift the hypothesis itself. So, in addition to the soliloquious nature of systemic hypothesising I have described, there may be value in asking colleagues questions, such as about particular ideas and even how they think the expert themselves is 'doing'.

Unfortunately, as I have described in Chapter III and later in Chapter IV, this level of collaborative shared action is not always readily established, certainly during the early stages of forming collegial working relationships, for a host of reasons. For example, I have even wondered whether my sharing of my hypotheses with colleagues, as to whether they felt that a home or community based programme would be more suitable than the centre based provision, led to them actually choosing a home-based simply because it was suggested by myself, the alleged expert in these matters, together with the other power issues in our relationship that I have described. While I am sure that this grossly simplifies what was a very complex series of social events, it does illustrate some of the potential pitfalls and complications surrounding collaborative systemic hypothesising.

I am also aware that there can be a certain closed circularity in the hypothesising process, which, if not recognised, can be restrictive. Given that our expert hypotheses are probably most visible in the questions that we ask of ourselves and of others, our questions are probably no better than the hypothesis that guided them. So while



hypothesising needs to be reflective, it also has to be reflexive, or otherwise our hypothesising may severely restrict both our understanding of events and the possibility of constructing unique forms of professional practice. I have found from reference to the systemic therapeutic literature, that as a guard against such non-reflexive thinking, experts have been cautioned not to 'marry' their hypothesis, but to just 'flirt' with it (Radovanovic, 1993), although clearly some degree of passion to our own ideas is inevitably required in order for innovative ideas to be conceived. Nevertheless, in addition to recognising our inevitable hypothesising, a certain irreverence towards our hypothesising seems to be called for. Perhaps by this means as experts we may come to fully acknowledge our hypotheses to be simply more or less useful, rather than being 'true' or not, and so thereby remain ready to relinquish our hypotheses rather than to defend too steadfastly.

As an example of my own inertia in discarding my cherished hypotheses concerning the Engela Portage Programme, I am aware on reflection that it took me some considerable time to begin to question my own taken for granted hypothesis that the most effective way to support local families was necessarily through helping them to teach their children new skills using behavioural teaching techniques. Subsequent events and experience, however, as I have described in the Chapter III, taught me to reframe this understanding and to substitute a new hypothesis, in which I came to believe that we, as a team, could best support families and children by helping them to interact more frequently with each other and by providing supportive visits to their homes. In many similar respects, once I began the processes of reflecting upon, questioning and deconstructing my own practice, the hypothesising in which I was engaged in Namibia regarding the direction of the Programme and my relationships with my colleagues similarly became far more flexible and open to change.

Of course, becoming aware of our expert hypotheses regarding practice options and the nature of relationships with colleagues is simply the first step in the systemic process. The expert has then to consider the practice steps and the complex interpersonal processes that must follow and eventually lead to action and change and I have found that such practice 'moves' have been systemically conceptualised as 'strategising'.

### *Strategising*

From my first-order account of the Engela Portage Programme's inception described in Chapter III, through to its later development, it is possible to identify during the course of the changes that took place some significant differences in understanding between myself and my colleagues. I have described, for example, the differences regarding the understanding of my role; the manner in which we exercised our professional responsibilities; the nature of the relationships that we had with families; and the understanding of what we might expect from local families as they participated in the Programme. I have also explained how, in addition to these differences of understanding, that in respect to my own professional agency I also relied wholly on the goodwill and co-operation of my colleagues. Without their assent I simply could not have functioned and it was necessary for both myself and my colleagues to learn how to successfully negotiate with each other and how to come to some understanding about each other's different worldviews.

The resolution of these and other differences of perspective between my colleagues and myself was, in the event, not achieved by my following any pre-planned management strategy or by the use of a deliberate problem-solving framework. Rather, I found that as with so many issues and circumstances with which I had to contend, it became a matter of proceeding in a more tentative and deliberative manner. Reflecting upon this approach, I think that the means by which we as a team began to work towards resolving the difficulties caused by these differences of understandings seemed to correspond to the hypothetical process which Tomm (1987) referred to as 'strategising'. As with the concept of hypothesising, I have found that Tomm's notion of strategising also provides a helpful practice concept by which I can understand some of the wider and crucial interpersonal aspects of my professional practice. Equally, I believe this practice concept may prove useful for other Portage experts to begin to embrace this neglected area of practice and to also start to think about the interpersonal aspects of their cross-cultural practice.

While I have already referred to how I have been unable to find any references within the Portage literature specifically to the interpersonal concerns of practice, I have mentioned a few studies concerned with educational programmes generally in developing countries that have directly focused upon some aspects of the interpersonal and social problems of



programme implementation (Leach, 1991, 1993; Walker, 1994). These studies have revealed how interpersonal factors and problems had complicated initial practice aims. Importantly, they have described how a mismatch between the expert's understanding and that of their local colleagues can cause difficulties in the establishment of a collaborative working relationship. However, despite recognising that social interactional problems existed between the expert and colleagues, and the importance of the 'human dimension' and relationships, neither Walker (1994) or Leach (1991, 1993) specifically examined the question of how experts might actually attempt to both understand and to begin to resolve these difficulties. This is where I believe that the psychotherapeutic concept of strategising may prove relevant.

To paraphrase Launer (1998), strategising is the reflective process by which we continually make decisions about what to do and say regarding our professional relationships, in the midst of practice, as our consultative practice unfolds. Clearly then, strategising would seem to have a direct relationship to the process of systemic hypothesising that I have described above. However, this strategising is not the managerial manoeuvrings or employment of planned strategies. Rather, it is the personal, reflective process by which experts are asking questions of themselves and answering them with a view to maintaining the interpersonal 'ethic of participation' necessary for dialogue and reciprocal learning described in my claims to knowledge.

Reflecting upon my own experience and that which might be framed as strategising, following on from hypothesising, this too related to the process in which I began and maintained a reflective, tentative conversation with myself about my conversations with my colleagues. Drawing upon Tomm's (1987) concept of strategising, Launer's (1998) suggestions regarding strategising questions for the expert to ask themselves included, for example: which hypothesis might I explore now?; which questions should I ask now?; what effects do I want?; should I pursue this issue further or explore another?; etc. As a further concept of systemic expert practice, strategising therefore also encompasses the continual reflection, both intellectually and also intuitively, upon the manner in which one interacts with colleagues so as to effect a smoother collaborative endeavour. I think it is also possible to usefully tie the conceptualisation of strategising with the interactive idea of Shawver (2001). Shawver referred to how experts needed to direct their practice so as to provide opportunities for others to genuinely contribute to the

interactive process such as through ensuring that they ‘talk-in-order-to-listen’ rather than perhaps fall into the expert role of ‘listening-in-order-to-talk’ and thereby unhelpfully display and confirm their expert authority over others.

As a social interactional concept, strategising seems to accord with the general perspective of enactive professional practice I have also described, in that it too suggests a need for an artful sensibility to context. Again, strategising was not something of which I had been directly conscious in my earlier professional career. Perhaps within the less problematic and the familiar surroundings of my professional role within the United Kingdom, this enactive and reflective process was more or less seamlessly incorporated within daily professional work and eased by a greater level of mutual understandings, shared expectations and worldviews that I held with colleagues. Yet, within the ‘foreignness’ of Namibia, there was much that I could not take for granted and had to begin to try to understand. Simultaneously to trying to understand the unfamiliar within Namibia, I also had to consciously reflect upon my own thoughts and actions related to my hypothesising and ways of most appropriately interacting with my colleagues and others, that is strategising, and try to adapt my approach to accommodate this new understanding and so collaborate effectively with colleagues.

Aspects of the process of strategising, at least as I understand it, appear to reflect the conceptual idea of a ‘responsive choreography’ described by Davis and Sumara, (1997) by which they claimed effective expert practice enactively develops degrees of harmony with the social and physical context in which it takes place. Moreover, strategising might be understood as more than an intellectual activity, but also include the expert’s intuitive and emotional human responses as he or she ‘reads’ the situation, based upon their own experience, and as they dynamically learn during the course of their interactions with others. I am aware that such processes can not always be fully explicated to others. Benner (1984, p. 42, insertion added, original emphasis) similarly claimed that:

“ it is possible to describe expert practice.. but it is *not* possible to recapture from the experts in explicit, formal steps, the mental processes, or all of the elements that go into their expert recognitional capacity to make rapid assessments...(experts) do not build up their conclusions, element by element; rather, they grasp the whole”.



Usher et al. (1997) likewise acknowledged the problems with the rendition of experience and the tacit aspects of practice, in that tacit, by definition, defies clear explication. Huberman (1999, p. 295) also referred to how researcher-informants working alongside practitioners found that some of their revelations and generative ideas or messages did not appear systematically, but often suddenly or inexplicably and that for most researchers “becoming permeable to the messages was a developmental process”.

Indeed, I think that the strategising notion of interpersonal or social sensibility seems to also have some resonance with Shotter’s (1993b) ‘knowledge of a third kind’. Shotter claimed that this type of knowledge usually remained ‘unvoiced’ in our contemporary lives and socio-psychological debates and was “to do with how *to be* a person of this or that particular kind according to the culture into which one develops as a child” (Shotter 1993a, p. 19, original emphasis) and that:

“it is an embodied form of practical-moral knowledge in terms of which people are able to influence each other in their being, rather than just in their intellects; that is, to actually ‘move’ them rather than just ‘give them ideas’” (pp. 40-41).

Elsewhere, Shotter (1993b, p. 229) claimed that:

“This kind of knowledge is different from rational knowledge (for instance, theories), and practical knowledge (for instance, skills). Knowledge of a third kind might be regarded as a sensitivity to finding a position in relation to others which makes the conversation useful for all the parts”.

Strategising then might be best conceptualised not as a rigid set of responses, but as a dynamic, imaginative process by which the expert tries to understand which approaches most effectively encourage and sustain collaborative interaction and ease interpersonal relationships in the uniqueness of a particular context. Clearly, these can not really be set down as a series of techniques or action steps for the expert to follow.

When I reflect upon my own practice, and particularly upon the manner in which I tried to coax my colleagues to work collaboratively, I can identify how this notion of strategising seems to describe much about the quality of the tentative, incremental, trial and error manner in which I had to proceed, when there were no straightforward answers to the questions I sought about what to do. Rather, it was a matter of formulating and then reformulating ideas and approaches over time and trying to ‘feel’ a way forward.

Perhaps this process of strategising was most visible during the meetings and conversations that we as a departmental team at the Engela Training Centre held to discuss changes in which I, and no doubt also my colleagues, had to learn and adapt our behaviour and understanding, so that we could work effectively together. As I have described, the language difficulties between my colleagues and myself ensured that we all had to pay particular attention to the manner in which we communicated. During these conversations I was aware that I needed to be careful and selective, that is to strategise, about how I introduced different ideas to my colleagues, and presumably my colleagues were likewise selective in the opinions and ideas they brought forth. To reiterate, this was not so that I was better placed to sway the opinion of my colleagues, but so that they might grasp and share my meaning behind my ideas.

I think that it is possible to understand this interpersonal manoeuvring and sensibility and our concern to adapt to each other communicatively, by again referring to Maturana's (1988) idea of 'fit' and orthogonal relationships I initially mentioned in Chapter IV. I have described how in terms of understanding systemic relationships, Maturana (1988) suggested that to bring about change required adequate orthogonal interactions, but that the interaction should be one of which the members are capable, that is, it must 'fit' with the members. However, while the degree of fit is necessary to ensure that the orthogonal interactions are productive, this 'fit' should not be too comfortable, as this would not induce any change at all.

Anderson (1992a, p. 88) also suggested that experts need to consider whether the conversations they hold with those whom they wish to support, and presumably to also learn from through exchange, are either "appropriately unusual or too unusual". Anderson (1984, p. 371) claimed that the questions we as experts ask during our conversations with others "must be different enough from the repeated ones to be new, but not so different that they sound bizarre or odd, and not to be taken seriously". This process of expert reflecting carefully over the type and level of questions to 'pitch' to others, closely concurs with my own experience and appears to be very similar to the concept of strategising I have described.

Furthermore, reflecting upon my own practice, I am aware that my strategising appropriately so as to match the local context developed gradually, as my experience and as my reflexive abilities advanced. During my dialogues with colleagues, I also found



that I had the difficult task of developing my skills so that I could match my style of communication with those of my colleagues. I needed to deliberately strategise about the phraseology I employed, the rate and pace of the conversation and the metaphors I chose, so that my contributions were not 'too unusual'. Given our initial differences, such as regarding our worldviews, culture and general understanding, etc. it is clear why this process took some time to evolve and why it was not something that was instantaneous, as might perhaps be expected when working with colleagues who share similar cultural worldviews.

As I have also described in Chapter IV, perhaps my own concept of collaboration also did not 'fit' with that of my colleagues. If so, this may provide one explanatory narrative to account for their apparent early reluctance to participate in the collaborative process, as I initially understood it. They may have found the ideas and concepts for change that I posed too radical or even inappropriate for their understanding of their needs locally. No doubt my colleagues were similarly also strategising their way through our conversations and interactions, so that we could mutually achieve a generative degree of 'fit'.

Ultimately, I believe that the expert who acknowledges interpersonal processes such as strategising is also more likely to be concerned with the practice ideals of tolerance, consideration and respect. So rather than being conceptualised as a manipulative ploy, strategising is probably an important concept for the whole ethical endeavour which constitutes the nature of the relationship between the concerned and committed expert and their colleagues, and which is perhaps also best understood within the broader tentative approach that I shall describe below.

### *A Tentative Approach*

Within the West I think that experts are popularly considered to be professionals who use their special knowledge and skills to identify problems and their cause or source, and to prescribe a strategy for solving these problems and then to authoritatively 'get on with the job' of implementing this strategy so as to resolve problems. Furthermore, professionals are also traditionally perceived as experts who conceptualise about presenting problems in ways which are better informed than non-experts due to their extraordinary knowledge and then develop plans and ideas for change derived from their own particular theoretical orientations which they confidently believe will achieve the desired results.

As an educational psychologist with a grounding in cognitivist and behaviourist theories, I can reflectively appreciate how my early involvement with Department Three of the Engela Training Centre also echoed those particular aspects of my own conceptual background as I described in Chapter IV. The need to formally organise and to develop objective structured plans, the emphasis upon recording, and the adoption and implementation of Portage, and the importance I gave to 'information', all appeared to demonstrate my own confidence in my preferred early meta-theoretical and theoretical leanings. While at the time I sometimes perceived myself as being unsure about the course of action that we as a Department would need to take, on reflection I can now appreciate how the broader cultural meta-narratives of my understanding essentially prescribed my practice along fairly familiar routes. As I have described, in many respects, the initial changes that I began to implement at Engela represented a pre-determined course, one actually marked by my certainty of what changes were needed to improve the operation of the Department. Unfortunately, as I came to appreciate, this certainty was not conducive to creative change at all, but rather more to the exercise of control and power, albeit unintentionally.

Yet, as my descriptions of change give account, over time and with the extended opportunity to work increasingly closely with my colleagues, and to share in the adventure of our collaborative practice, I began to become progressively uneasy regarding the appropriateness of my initial understanding of the task ahead, the emerging shape of the Programme and the nature of my management role. I have described how this unease also led me to begin to reflexively question some of my own early hypothesising and to scrutinise and to reconsider my own practice and my relationships with colleagues. By gradually embracing a scepticism of my instinctive professional reactions, and checking my initial tendency of hastily forming an opinion, I found that I began to also more deliberately, reflectively and reflexively think about my practice and so I believe, begin to facilitate more generative conversations with colleagues, as a means to try to understand their perspectives and understanding.

Considering the transformations in my practice and thinking about my practice at that time, and the manner in which they could be said to have resembled the conceptual processes of hypothesising and strategising, I can see how a more tentative and



deliberative stance emerged in my expert practice. I use the term tentative not in its timid or equivocating sense, but rather meaning an intention to make less hasty judgements so as to invite and facilitate genuine, reciprocal interchange with others. Indeed, there were several characteristics of this more tentative approach to my practice that began to arise and again I can retrospectively trace some similarities to aspects of social constructional practice advocated and described within the systemic psychotherapeutic literature.

Anderson and Goolishian (1988, 1990) for example, suggested in regard to the therapeutic relationship, that therapists need to be cautious of understanding too quickly, claiming that the quicker a therapist tries to understand the people they are working with, the less opportunity will exist for establishing and maintaining dialogue and the more opportunity there may be for misunderstanding. Similarly, Maturana and Varela (1987) warned that experts need to adopt an attitude of permanent vigilance against the temptations of certainty. As with the epistemological and ontological themes of postmodernity that I described in Chapter II, Maturana and Varela (1987) advised that we should try to remember that the world we see is not *the* world, but rather *a* world which we bring forth with others and that many other possible worlds might equally be brought forth in different social and cultural circumstances.

Following this cautionary practice perspective, as within other professional disciplines that have begun to embrace the postmodern stance, contemporary systemic theory warns that experts need to beware of the enchanting meta-narrative. This position also implies that, where there is a conflict over meaning or ideas, or as Leach (1991, 1993) suggested 'perceptual gaps' between experts and colleagues, we cannot affirm what for us seems certain without potentially negating the views of others, as I have described in the issues related to power previously in this thesis. Such perceptual gaps are therefore unlikely to be bridged when the different parties concerned remain certain of their own particular perspectives, but such gaps might begin to close through those concerned beginning to shift towards a new understanding, derived through respectful and collaborative effort, and of course dialogue. As Shawver (1998) argued, in such dialogue consensus does not necessarily have to be achieved nor is it always desirable, but simply that an awareness of the 'other' is crucial. It again seems likely that when the expert in their practice appreciates the importance of collaborative endeavour that this may in itself also help the

expert to avoid characterising local needs too quickly or prescriptively, and so also avoid constraining future options and understandings. Practising tentatively therefore seems to be an important precursor to ensuring generative dialogue, both self-reflexively and with others.

Furthermore, tentative action might be said to conceptually provide the necessary 'open ground' for the expert and their colleagues to learn more about the shifting social context in which their practice is to take place and so also witness the beginning of a move towards sharing each other's understanding, and allowing room for unique information to potentially arise. Clearly, this view does profoundly challenge the typical understanding of the knowledgeable, confident and forthright expert that is often understood within the West (Schön, 1991).

In retrospect, I believe that perhaps the roots of my own caution and the emergence of the tentativeness in my own practice were also already visible during the first year of my involvement with the Department. This was evident, for example, in our collaborative decision to reorganise the Department, so as to offer two residential courses to the two smaller groups of students, rather than to launch wholeheartedly into providing a home-based, Portage inspired programme. Aside from the considerable preparation that such a programme entailed, I think that my obvious enthusiasm for these changes to the Department was also tempered by an awareness of my colleagues' reservations at that stage, coupled with my own trepidation. In the largely first-order account that I have given in Chapter III, I have primarily described this period as necessary in order to ensure that we had sufficiently planned for the practical operational requirements of the Programme. However, in addition, I think I also realised that such a change at that time would have been far too drastic and 'too unusual' for my colleagues to cope with (Anderson, 1992b). Indeed, given my own lack of experience in changing the entire focus of a department, it was clearly 'too unusual' a move for me also at that stage.

It is also interesting to reflect on whether I would have gained such insights and formed such a close collaboration with my colleagues had I worked alongside another Western professional. Would I have questioned my own assumptions so readily? Would the inter-relational power balance have shifted too far in our favour and excluded or detracted from the dialogue that I was able to establish with my departmental



colleagues? I believe that, had I worked in collaboration with a Western colleague, I may not have experienced the impetus to think afresh, certainly not in the wider tentative and critical reflexive sense. Concerning this issue of collegial support, my experience seems to contrast to that reported within the systemic therapy literature, where working within a team of systemic professionals is usually regarded as essential. As Boscolo and Cecchin (1982, p. 155) claimed, “all of us who have come into contact with the systemic model are aware of how difficult it is to renounce the linear-causal way of thinking, and this is especially true of the therapist working by himself”. Of course, I was not working by myself, but with colleagues, the ‘local experts’, who faced similar challenges to their own worldviews, and who were no doubt undergoing similar pressures to shift their own understanding.

Generally within the social constructional and systemic therapeutic literature, this tentative expert stance and the type of relationship it attempts to foster is conceptualised as the expert maintaining a ‘not-knowing’ or ‘non-knowing’ stance (Anderson and Goolishian, 1988; 1992).

The concept of a ‘not-knowing’ expert position seems to tally very closely with the postmodern and social constructional epistemology that I described in relation to research in Chapter II. Not-knowing is not about the expert’s lack of knowledge, feigning ignorance or withholding knowledge. Rather, this concept entails the expert relinquishing full control over the process of change and engaging with others, clients, colleagues, etc. so as to challenge and question their own expert, taken-for-granted, narratives. Not-knowing is a philosophical and ethical stance and refers to an expert’s intent regarding the relationship they establish with those with whom they work. To my understanding the practice concept of ‘not-knowing’ is also about developing a degree of humility regarding one’s own expert beliefs so as to provide greater scope for the formulation, collaboratively, of different understandings and possibilities, which are informed by those with whom we work.

I also think that this notion of a not-knowing approach to expert practice, clearly concurs with the view of the importance of dialectical knowledge in which the collaborative conversation, Shotter’s (1993a) ‘interactive moment’, itself becomes the author of new ideas, rather than stemming from the expert or indeed the client individually. Again, a

reflective and reflexive awareness of the consequences of expert hypothesising would seem to be important to striving for a 'not-knowing' quality to expert practice, as well as a consideration to the need for interpersonal strategising within this tentative practice approach. It seems to demand that the expert is called to ask questions of those they are working with so as to increase their own understanding of the other's world, rather than, as in the conventional sense, to gather information with which to try to formulate a diagnosis of the problem or a solution, or to assert their expertise over others. Importantly, this understanding of the realities of others is always understood to be incomplete and never a 'true' or final picture, but one that is always partial and needing to be constantly revised so that as experts we remain suspicious of any inclination we might have to claim that we 'know' the other. In this way not-knowing seems to be a similar characteristic to that I earlier in this chapter related to contemporary understandings of praxis.

Clearly therefore, the demands of expert practice brought about by the concept of 'not-knowing', are for the expert to use their expertise to foster the interpersonal conversation so that new ideas, understanding and meaning might arise out of dialogue. Of course, experts will inevitably introduce new ideas or suggestions themselves, but within a consciously tentative approach. As I began to understand myself regarding my own practice, these new ideas, hypotheses, will importantly be primarily used as a means to continue the conversation about meaning and possibilities.

Conceptualised as such, the tentative approach requires the expert to reflect upon the position that they adopt in relation to colleagues which returns us to the concepts of hypothesising and crucially, strategising. By position, I am referring to both the way in which the expert *listens* to colleagues and also the manner in which they *respond* to colleagues' ideas. Experts need to be mindful, that is to strategise, to adopt a particular attitude which encourages colleagues to contribute to the collaborative conversation and to dispel the embracing of a 'knowing more' position by the expert. Reflecting upon my own experience of practising tentatively and of questioning my own expert knowledge, I believe that this cannot accurately be described as a shift from a conventionally understood expert position to a systemic not-knowing expert position. Rather, it might be considered as adopting various *positions* which shift enactively between knowing and



not-knowing depending upon the presenting context, evolving understanding and importantly, the social sensibility of the expert and their colleagues.

Reflecting further upon my own understanding of the tentative approach and its emergence in my practice, I am also aware that in contrast to the therapeutic concept of 'not-knowing' as described by Hoffman, (1991) in which the aim is "making the expert disappear" (p. 12), this is not as I understand it. Rather, I think that not-knowing or non-knowing might more helpfully be conceived as recognising and respecting my colleagues' expertise as well as my own. Nor in my case was it the development of a 'not-knowing' position regarding my own expert knowledge, which would have been ridiculous, but rather one of understanding the need to be very suspicious about my own knowledge and understanding while not rejecting it.

In this way taking a not-knowing stance does not entail abandoning one's expertise nor, as I described in reference to Richardson (1990a) in defence of postmodernism in Chapter II, does it mean that there is no knowledge or that partial knowledge is necessarily bad or useless. Rather, a professional stance does need to be maintained, and help and advice can be offered, but this should be without practitioners presenting themselves as ultimate authorities. Importantly, our colleagues and others we work with are also considered experts on their own lives and needs. The practitioner brings their expertise to the encounter, but not a superior expertise. In this sense I do not see these postmodern anchored ideas as undermining or eliminating the role of the expert in the process of change at all. In contrast I see these ideas as transforming the focus of the expert to that which emphasises the replacement of individual rationality by communal negotiation and recognises the importance of social processes in the observational process, the forging of new meaning through language and the significance of pluralistic cultural investments in the process of change.

Understood in these constructive terms I believe that the agenda for Portage expert engagement becomes not principally to teach colleagues what it is that the expert knows, or to follow predetermined practice steps. Instead, I think that expert practice becomes concerned with the artistry of 'conversing' in a multiplicity of meanings simultaneously, with the expert recognising that they themselves are not the key to change but that the key is through dialogue and the interactive process. In essence, I recognise that there is a

certain irony associated with the practice of the not-knowing and the tentative approach, one in which when I think about my own transformations of practice I began 'to know that I did not know', so that not-knowing effectively could have been said to become a form of knowing, but one in which I understood the need to more assuredly practice tentatively. I suppose that as such I could have been said, in regard to my own practice, not to have escaped the power associated with my expert identity, but I believe that I may have at least suspended it temporarily and to have questioned it, and, as it seemed, gained sufficient freedom to appreciate some alternative and important perspectives. Of course where the not-knowing was genuine was in reference to my knowledge of my colleagues' wider cultural understanding and their worldviews. Nevertheless, while recognising that an exact appreciation of my colleagues' understanding and that of the families we worked with was unobtainable, striving to gain some insight through our collaborative conversations was I believe genuinely constructive.

### **6.3. The Challenges To Portage Expert Practice Of My Claims To Knowledge**

I have emphasised in my claims to knowledge that arose regarding my research into my professional practice, and particularly that related to Portage within a cross-cultural context, that I see these as the current state of my professional development. As the title of this thesis implies, they are part of my moving towards a more constructive practice, and thereby an understanding of practice, that I believe I will continue to work upon and develop through further research, practice experiences, and discussion with colleagues. Indeed, given the narrative nature of this thesis and the largely dialectic form of my knowledge, as might be expected, I have found it difficult to conclude this thesis as in its writing further ideas emerge which tempt me to write afresh.

However, I am also aware of a particular tension between the claims to knowledge that have emerged from my experience and research and the wider demands made upon my practice, in which I am called to practice expertly. Indeed, I have tried to stress within this thesis how despite the critical reflexivity at the core of my present systemic understanding of practice that this does not deny the role of expertise, or indeed the knowledge and ideas that the expert brings to the expert-colleague encounter. Both first-order expert knowledge and the adoption of a tentative, second-order systemic approach can I believe, when viewed from a constructional perspective, be considered as part of



the generative conversation which my expert practice has become. Therefore, in this final section of this thesis I believe that I need to explore further this complicated relationship between the apparent dualism of the conceptualised first and second order positions, as I found that this tension was certainly one with which I had to struggle throughout my involvement with the Engela Portage Programme and since. Indeed the problematic nature of this relationship created numerous difficulties for me concerning my actual practice and my developing theory of constructive practice and it is a tension that I have now come to recognise as part of my current reflexive professional practice within the United Kingdom.

The essence of this tension relates to how the systemically inclined expert can reconcile the belief in an anti-objectivity stance of professional practice, with the possible demands made by employers, colleagues and families with whom we work for concrete advice, clear ideas for action and development, and the sharing of our professional, Western expertise. As experts we have to live in a world where others sometimes crave 'certainties'. In particular, I believe that the implications of a social constructionist perspective of expert practice that I advocate within this thesis poses at least two dilemmas and sources of contradiction for the expert.

Chief among these must be the implications of the social construction assumption that there are multiple realities and that any particular reality is determined and forged by the dominant discourses of a particular culture. If this is so, how then does the expert decide on which or whose reality to settle upon in order to proceed, if all are seen as equally valid? Indeed, to consider all ideas or actions as equally helpful would suggest that no action might be viewed as legitimate action in itself. This dilemma is of course implicit in the criticisms which are sometimes levelled at postmodern thought that I described in Chapter II related to the apparent nihilistic hermeneutics associated with that conceptual position. Certainly, while working with my colleagues within Namibia, we were at every turn of our course of practice faced with a range of possibilities from which we had to choose a future course of action, all of which, as I have described, might be traced back essentially to our personal and socially constructed values and beliefs some of which were in contradiction.

Concerning my own role within Namibia, I was also aware that there was the difficulty related to my apparent higher hierarchical position relative to many of my colleagues within the Engela Training Centre as Head of Department Three. From a social constructional perspective, such a position might be judged as potentially subjugating of others, as the hierarchical relationship may encourage hierarchical knowledge transmission, which is potentially contrary to the notion of understanding as a dialogical and co-constructive process that takes place between people. Indeed, this relationship is rarely mirrored in the therapist-client relationship of systemic practice, where the client themselves are usually ultimately responsible for the choices and actions they take. Within, Namibia, I had clearly been employed by ELCIN as an expert and they understood that I would apply and share my expert knowledge and give expert guidance to my colleagues who I had formal responsibility to 'manage'. As such, both my professional practice obligations and expectations to be knowledgeable also ensured from the outset, that there was an explicit and implied hierarchy in my position with regard to my colleagues.

Certainly I also think that my colleagues understood my role to be that of 'the expert' in the conventional sense. The crux of this dilemma is therefore that had I initially joined with the intention of practising systemically, one would have had to question whether I could have justifiably, from a systemic second-order perspective, unilaterally have overruled their understanding and adopted a non-expert stance. To have done so would have been to have practised 'knowingly' and with certainty in the manner of a first-order relationship. It would have been to have controlled the meaning attributed to our relationship by my colleagues.

As it happened, my systemic awareness developed over time actually through my first-order relationship with my colleagues who were, as I have described, by virtue of our joint and enactive development within the practice context, also implicated in the development of my second-order systemic perspective. Nonetheless, even when these second-order systemic aspects of practice became apparent to me, there were inevitably occasions when I had to adopt a first-order hierarchical position, in line with my role as Head of Department with management responsibility to make certain final decisions and evaluations of the Programme, and meet the expectations of others.



Not surprisingly, such tensions that I have experienced and continue to experience in my reflections about my expert role have been shared by other professionals whose practice epistemology leans towards the postmodern paradigm. In terms of dealing with these dilemmas various ideas for conceptualising practice have been suggested.

Regarding the first dilemma, in which the expert is faced with many possible and alternative descriptions or realities from which to plot the course of their practice, Ravn (1991) called this the 'values problem'. Ravn claimed that this question had been addressed variously by constructivism and constructionism, usually through advocating that the expert follows courses of action which potentially increase the number of choices available, ensure greater autonomy to others and which lead to fresh alternatives. However, as I can attest to, at the point of action it is not always clear which of the visible options might best achieve these aims.

In terms of thinking about these tensions I have found the ideas of Anderson (1987) to be particularly helpful. Anderson saw experts confronting this dilemma by their dismissing the apparent binary dualism of modernist thinking through conceptually understanding their practice in terms of a 'both/and' position. Anderson contrasted this with the tendency to understand practice in 'either/or' terms to which I also referred in Chapter II. Indeed, according to Lather (1991), it seems that even within contemporary natural science, following the advent of such recent theories such as quantum physics, binary either/or positions are being challenged by both/and logic that questions the reductionism and linearity of conventional scientism.

This suggested both/and perspective also concurs closely with the social constructional belief regarding the value of holding multiple perspectives and of appreciating diversity, rather than experts conceptually setting up and then choosing between binary oppositions such as either first-order or second-order expert positions. Indeed, social constructionism encourages a view of these positions as no more than linguistic positions, artefacts of language rather than foundational realities. Anderson (1987) also felt that the adoption of a both/and position to understand expert practice may help the expert avoid the modernist tendency to be drawn towards one particular idea or belief of what is 'right' or 'true', and to shift the focus to understanding and exploring different positions, without the haste to choose between them so as to determine which is

‘correct’. It would seem that by understanding practice in terms of this inclusive systemic concept, even ideas and possibilities which are logically inconsistent with the expert’s own logical rationality might be considered and maintained.

Understood as such, I can also appreciate how adopting a constructionist both/and view of practice does not necessarily imply that all ideas are equally useful or that all are equally ‘correct’ or indeed that some are not ‘wrong’, at least from my own perspective. Rather, recognising the specificity of context and acknowledging the influence of prejudices and partiality, it is still possible to claim that some ideas might be said to be more helpful than others, although the contingent basis on which judgements about helpfulness are made should be explored and made visible. As I found from reflecting upon my own practice, I certainly came to see particular forms of working with my colleagues and managing the Engela Portage Programme as more useful and effective than others. Furthermore, there are some ideas which I believe from the standpoint of my own socio-cultural background are ethically more acceptable than others. As such, my first-order responsibilities could be said to have also remained a very important component of my expert identity and my professional actions throughout my involvement with the Engela Portage Programme, although I believe these became far more generative and indeed ethical when a second-order, systemic awareness was also acknowledged and is available to challenge them.

In this way I believe that this notion of a both/and expert stance may therefore offer a useful conceptual means to begin to understand the apparent tension between first and second-order practice and to consider an integrative perspective. As I have described above, the ‘position’ that I found myself occupying, in regard to my aspiring to remain tentative in my relationships with my colleagues, was more accurately described as a shifting between positions of both first and second-order practice, of knowing and not-knowing. This seems to concur with Spivak’s (1987) view that as committed practitioners we have to create “a weave of knowing and not-knowing which is what knowing is” (p. 78, quoted in Lather, 1989b, p. 21).

Considering my own expert practice, I am aware that through the problems and difficult circumstances I experienced together with the enactive response to the context and as a reaction to the tensions and dilemmas, I came to usefully understand how that practice



progressed positively to include that which intended less hierarchy, less control and a greater sense of self-reflexivity. Although ultimately I think that my practice represented a striving towards the constructionist 'ideal' of a second-order position, rather than its actual attainment. Perhaps this is the 'ideal', a striving towards and never arriving, as to do so might signal closure and certainty. In this way the tension and contradiction which are inevitably part of a reflective and reflexive awareness of one's practice can be understood as an important resource and an inevitable part of 'good' expert practice by ensuring that practice is never complacently settled and always open to challenge, question and change.

Similarly, Larner, (1995), considering the potential dilemma posed by the higher hierarchical position of the systemically aware expert, suggested an alternative integrative position for first and second order practice perspectives, which he claimed allowed experts to avoid the first and second orders dichotomy. Larner argued that experts might attempt to go beyond the modern versus postmodern conceptual dichotomy into what he termed the 'paramodern'.

According to Larner, the paramodern might be conceived as an awareness and respect for diversity and difference, while acknowledging the professional's practical responsibilities to be knowledgeable and to have expertise. Intervention, as such, might be conceived not as involving an expert, but rather a person or persons with expertise. As Larner suggested, the paramodern is in effect the 'knowing' in the 'not-knowing', the power in the non-power, the first-order stance in the second-order stance, and vice versa. By conceptually adopting a paramodern stance the expert allows theories to guide their action in spite of the fact that they are aware that this creates the paradox of 'knowing' about being 'not-knowing'. Experiencing the tensions and dilemmas of a second-order systemic stance, Larner's point seems to be that just as he does not allow theory to dictate his practice, so as a paramodern he does not require the postmodern theory that guides him to be completely right.

This is clearly a personal praxis approach to expert practice which I especially appreciate as it seems to concur with the personal, individual action research approach within which I have methodologically positioned this thesis. There is at the heart of this paramodern concept a central pragmatism to this stance in which Larner claims postmodern theory is

used for ethical reasons, disregarding the paradoxes and tensions within the theory that guides him as a practitioner, although I feel that rather than disregarded, these tensions might be recognised as symbols for unsettling any temptations towards practice and theory complacency.

Therefore, as Portage and educational professionals, faced with problems and different practice contexts, I think it is possible to appreciate both how we must inevitably start from where we are, what we know and what we believe in, but in line with my claims to knowledge to also recognise a need to be open and inclusive to alternatives.

In this manner I do not see Portage, ostensibly an archetypal first-order, modernist creation, as necessary in conflict with postmodern philosophical sensibilities. Rather, I believe Portage has much to offer, beyond simply representing a robust, relatively low cost and technically sound means for helping local colleagues with minimal training support families with their children; children whose disabilities and special needs might be expected to challenge even the most experienced and qualified of experts. As I hope my own experiences have demonstrated, Portage with all its apparent certainties and Western implicit values, can in fact represent a powerful vehicle for genuine interchange and collaborative learning when the expertise of the implementing experts ensures they are prepared to question the epistemology of their practice and adopt a second-order, systemic perspective in which they respond appropriately and ethically to their colleagues realities, so paving the way for new forms of understanding and of practising Portage.

In this way I believe there is still a place for the structure and procedures of the Portage model, but Portage does not become simply identified and understood solely in terms of special techniques. However, nor does Portage practice from this alternative perspective become woolly and agenda-less, but it does become less hierarchical and less dualistic, and so more collaborative, mutual, flexible, self-critical and responsive. Moreover, understood in these terms I believe Portage becomes less focused upon analysis and much more upon synthesis.

Consequently, by embracing the paradigmatic shifts and social constructional themes, as Portage experts we might also be best placed to be aware of how our own theories and



practices take place within and are influenced by a broader social network of conversations outside of our sense of individual thinking and reflection. In this respect I particularly value Lather's (1989a, p. 330) idea, who quoting Rabine (1988, p. 27), suggested that one option for understanding the conceptual and action conundrums of practice might be to:

“ground our action “not in terms of a stable opposition but in terms of an oscillation between several positions, in which the necessity of adopting a position in a given situation would include simultaneously calling it into question””.

I think that what eventually emerges from this type of professional stance does not imply necessarily a total uncritical acceptance of all views or ideas, but the possibility of the creative construction of an intermediate way. This intermediate way would be between the usual space we, as Foucault (1977) claimed, discursively locate ourselves as experts and the space of others we work with. Perhaps the task becomes one in which, rather than being paralysed by the critical questioning and undermining of foundational ideas and standards frequently associated with the postmodern conceptual position, we actually start to evoke much more creative and appreciative ways of working within the consequences of the postmodern epistemology as I have tried to demonstrate to the reader regarding my own practice within this thesis.

#### **6.4. An Invitation To Possibilities**

“Having made a discovery, I shall never see the world again as before. My eyes have become different; I have made myself into a different person seeing and thinking differently. I have crossed a gap, the heuristic gap which lies between problem and discovery” (Polanyi, 1958, quoted in McNiff, 1988 p. 52).

Within this thesis I have discussed how I believe the postmodern serves both as problematic to Portage expert practice while simultaneously also offering the possibility of an alternative epistemology of expert practice, my personal understanding of which I have described. It is not a settled picture of practice, nor was it intended to be as there are many tensions and contradictions within an understanding of it which serve to both disturb a clear picture of it, but which also represent its generative strength. My aim has not been to prescribe a form of Portage expert practice, but rather in describing my own knowledge and understanding of the shifts in my practice to the current perspective, to evoke ideas which may serve as useful conceptual resources for the reader to consider

regarding the development of their own expert practice. As I suggested in Chapter I, I have been particularly concerned to consider the skills that I believe are required by Western Portage experts who act as a consultant to others, especially when the experts introducing Portage are from a different culture from the receiving group, as this is a further crucial area of Portage research which has been largely neglected to date.

I have also described how I think that my practice has come to reflect a contemporary postmodern understanding of praxis. This is an understanding of praxis as a complex synthesis of both practice and research, or practice and theory, each informing the other, so as to become a unitary activity, one which is continually in flux and always being worked upon to meet the complicated, shifting dynamics of the expert's present context. Certainly as I have described, my praxis has helped me to think profoundly differently about my own expert practice. In this transformation I have come to challenge my own previous understanding of the notion of Portage practitioner expertise and techniques, including the knowing of pragmatic programme forms ahead of time, which are so deeply rooted in educational psychology culture that basic relational characteristics, those that I have described and discussed within this thesis, get lost from our expert view and appreciation.

Where I believe postmodernity particularly informs this different understanding of expertise is through the ideas of social constructionism which have helped me to shape my own current thinking about Portage expert practice and my practice generally, as I have described in my claims to knowledge, and which has already invited practitioners in other fields to generate new conceptual research and practice tools. These are person-centred and interpersonally concerned ways of researching and practising, challenging the depersonalisation and dehumanisation, the certainty of knowledge and the myth objectivity which mark the prevalent technical-rationality model of Portage expertise.

I also realise however that as experts we are very much in the throes of a continuing epistemological revolution in which it is probably unreasonable to expect definitive answers to the many questions regarding practice posed by postmodernity and specifically social constructionism. Nevertheless, the understanding of Portage expert practice I have advocated in this thesis I believe not only challenges the positivistic philosophical hegemony and related conventional and established patterns of consultancy



from the West, but also simultaneously possibly provides some indications of more effective ways of sharing our expert skills with others. At the heart of my concern has been highlighting the need for Portage experts to importantly ask themselves, both personally and as a profession, a basic philosophical and methodological question, as to whether the production of theory and ways of practising in one place and its application in another is any longer acceptable.

Indeed, this invites a further question as to what extent do we as experts appreciate the ability of local colleagues and others to contribute to and to guide their own process of change and development, and to what extent do we as experts see our role as introducing our own cultural strategies, guidance or priorities? As the reader will now be aware, I personally believe that the simple importation of Western ideals and associated practices can no longer be justified, and that as experts we need to turn our professional attention to the challenging and complex task of forging ways of practising and introducing our own knowing which are more appreciative of relationships than technologies, which value local knowledges and meanings, and which generate more localised and unique theories together with constructive ways of working with colleagues and families. The very nature of this understanding of expertise ensures that there will be no expert handbook or simple formulas and sets of techniques that it can be reduced to, or that might be duplicated from one context to the next. Each expert-colleague relationship will be unique.

It is in this dialogical manner that I think the future development of a systemic epistemology of Portage expert practice is most likely to continue to creatively unfold. It will be the paralogical conversations between the opinions and orthogonal experiences of different Portage experts and those they work alongside with within different cultural contexts, which include the local and the unique, which will be the engines of change. While I see my thesis as being part of this wider movement regarding Portage expert practice, I am also very aware that what is urgently needed at this time are further creative ideas, new ways of thinking about expert practice, about how to engage others in conversations with experts, which are more appropriate for human beings. We need new ways of engaging which do not suggest finality or closure, or suggest to others that we know the truth about them and their ways of life and know how they should organise their families and lead their lives. We need further expert practice theories and

conceptual resources which augment and enrich the scope of Portage practice and research.

To this extent I see this thesis as my attempt to generate further dialogue that will help to include within the range of Portage expert practice a dialogue which crosses cultural boundaries, although I am convinced that the future development of such a dialogue inevitably rests within a concern for relationships. I feel confident that once Portage experts appreciate and elevate the significance of mutuality within the relationships surrounding change, the human reality and the presence of the expert, and the necessary readiness of the expert to be open to change, then this potentially opens to practice new constellations by which to steer our practice. It is now time that we begin to re-imagine what we mean by Portage practice and expert practice, an act which itself is likely to be followed by a period of hopefully fruitful experimentation from which will emerge a different and more constructive way of working although it is impossible to predict without undergoing the process of change what this expert practice might resemble. As I have tried to demonstrate within this thesis, this will no doubt involve some severe questioning of our most cherished theories and values, and these will need to be open to more radical scrutiny.

Finally, this thesis has primarily served to document and demonstrate my own expert journey towards achieving such a constructive understanding of practice. It is both product and process of my praxis and its writing has been a journey informed by shifts in practice and my continuous search to describe and understand my own practice experiences, an individual action research trajectory. Like all knowledge claims, my thesis reflects a particular standpoint, although I recognise that other standpoints could be also taken. My purpose has not been to dismiss and replace other Portage and expert practice theories but to first make explicit some discourses that are usually left implicit in the world constructing activities of most Portage research and practice narratives and to invite consideration of, and to begin the task of suggesting, other possible discourses that might allow very different approaches to Portage and expert practice.

Consequently, in terms of judging the validity of my ideas regarding my praxis, as I described in Chapter II, I hope that the reader will be convinced by the degree to which my reflective analysis of my expert experience, and this representation of it, has revealed



my own reflexive partialities and a concern for interpersonal issues such as power dynamics and by my desire to improve my expert practice and to expand my knowledge of that practice. I hope that for the reader that my thesis' validity will be evident in the manner in which my practice-research has opened my awareness to alternative understandings of the world, as well as how the narratives of this thesis have described how my experience and reflections upon that experience have transformed and challenged my understanding of the conventional Portage expert practice endeavour. I believe that it is through these means that the validity of my own practice-research and my original contribution to educational knowledge and educational expert practice should be most appropriately validated. Furthermore, I have tried to demonstrate in my description of my expert practice and understandings of that practice how these validity questions are not simply standards to be attained and against which to match my practice-research. Rather, these questions are the very substance of the constructional perspective of expert practice that I am advocating within this thesis.

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