

**THE CHAIN OF ACTIONS IN SPECIAL EDUCATION – THE RELATIONSHIP BETWEEN NATIONAL GUIDELINES AND MUNICIPAL FOLLOW-UP: AN EVALUATION BASED ON A CASE STUDY FROM ONE NORWEGIAN MUNICIPALITY**

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*This article discusses the chain of actions in special education in Norwegian compulsory school. An analysis is made of how the municipality follows up national guidelines relevant to the chain of actions through its own guidelines to the schools. The analysis gives the general impression that the local authority is facilitating guidance to the schools in a way that accommodates national regulations effectively, thus contributing to a situation in which national laws and regulations for education can be implemented through the different components of the chain of actions. Nonetheless, there appears to be a need for a revision of the guidelines in some areas, including a clearer emphasis on the consideration for inclusive education as well as collaboration among the teaching staff.*

*Background*

*Special education – the need for local follow-up of national guidelines*

Implementing a type of education that is adapted to the individual pupil's abilities and aptitudes has been a key challenge for the Norwegian education system for a long time. This challenge is not merely related to intentions formulated by the government, but also to the local follow-up of these formulations (Bjørnsrud & Nilsen, 2008). The national Education Act posits that adapted education shall partly be carried out through ordinary education and partly through special education. A pupil who does not adequately benefit from ordinary education in spite of the individual adaptation entailed in this form of education, has the right to special education. Special education is therefore the recourse when there is a greater need for individual accommodation than that provided by ordinary education.

The research question for this article concerns the chain of actions in special education in compulsory school. Emphasis is initially on which municipal guidelines are issued for the different components of the chain of actions, prescribing how the local schools should provide for special education. Secondly, an analysis of how these guidelines harmonise with and accommodate government regulations is carried out.

There is an obvious need for more knowledge on how institutionalised systems of special education function (Bachmann & Haug, 2006). Both government supervision and surveys (Riksrevisjonen, 2005-2006) have uncovered an inadequate understanding and practice of national guidelines in several municipalities. A considerable variation in the scope of special education appears partially to be associated with local differences in the interpretation and practice of guidelines. The local interpretations of the guidelines may in some cases deviate from the intentions of the law, creating a situation in which the formal requirements for special education are not met (Nordahl & Hausstätter, 2009).

*Interplay between State, municipality and school*

In Norwegian education policy, emphasis has for a long time been on the development of better interplay between the different levels of the education sector (Storting report no. 37, 1990-91). It has been noted that there is a need for both a clearer national supervision and better local follow-up, and that the quality of education depends on coordinated efforts at all levels (Storting report no. 31, 2007-2008). The system of government posits that the *State* has the overriding national responsibility and that it shall decree the frameworks and guidelines for education by way of laws and regulations. This includes the regulation of the right to special education and the establishment of different procedures for clarifying, endorsing and implementing this right. At the local level, the *municipalities* have the

challenging task of following through and implementing the national guidelines within the local context. This makes it necessary for the local authorities to substantiate and communicate the guidelines for special education to each school, thus setting requirements for, and challenging the way in which the schools accommodate rights and procedures. In addition there is the question of supporting and following up the schools. This occurs through ensuring the availability of resources and materials necessary for the work, for example through developing competency and services such as the Educational and Psychological Counselling service.

It has long been known that the Norwegian system of government is encumbered by a difficult balance of decisions between government rule and the decentralisation of responsibility (Karlsen, 1993), a state of affairs which has engendered questions about whether the quality of education is governable or not (Weiler, 1990). This problem of the locus of decisions is a constant challenge for the Norwegian education authorities. *The Knowledge Promotion*; a recent national education reform, has the general objective of a combination of clearly formulated government goals and local scope for action, based on trust in the local ability to find solutions. However, the reform appears ambiguous in the question of the locus of authority, distribution of responsibility and the local scope for action (Sandberg & Aasen, 2008). The perceived decentralisation of the pedagogical responsibility that ensues from the reform is something many schools have utilised to develop a more extensive and segregated form of special education (Nordahl & Hausstätter, 2009). Thus, governmental signals about an increase in local responsibility have caused some schools to adopt a practice according to their own culture and tradition, even where this is contrary to the intentions of the government. One question then becomes: how does the local authority – as mediator between the State and the schools – relate to government rule and what does it communicate to the schools?

Current tensions between political and professional management is also a factor influencing the issue in question, often in such a way that the local levels are characterised by the more professional approach (Langfeldt, 2008). The professional supervision emphasises the autonomy of the professional agents, and may come to be in opposition to a hierarchical view of control (Elstad, 2009). At the same time, there is a question of development from an individual to a more collective professional responsibility, so that collaboration and school-based development have received more emphasis (Imsen, 2009). While the law contains some concrete requirements for special education, other important guidelines give wide margins for local interpretation about how the practice should be carried out.

The behaviour of local authorities and schools should not be understood as merely a form of instrumental intervention in which they obediently and without comment accommodate signals from the government. It must also be understood from an institutional perspective in which the local culture and local context have an obvious influence in the decision process (Christensen, Lægreid, Roness & Røvik, 2007). Local authorities and schools do not view themselves solely as operatives and implementers of government rule. It is a question of a distribution of responsibility in which local units will also have influence so as to accommodate local needs and conditions as well as the national objectives.

#### *The chain of actions in special education – a support system for the pupil's learning*

The provision for special education in a municipality occurs in many areas. A chain of actions is referred to, from the disclosure of a problem and the reporting of it by the teacher, to the involvement of experts to assess the need for special education. This process also entails the approval, planning, execution and evaluation of the intervention. This chain of actions involves the collaboration of players in several different arenas: the local authority, school and the Educational and Psychological Counselling service. In addition, the parents and the pupils themselves play key roles in the different phases of the process. With the national guidelines as the point of departure, the chain of actions normally comprises the following main phases:

- The teachers send a report of the problem to the school's special education team for discussion
- The school sends a referral to the Educational and Psychological Counselling service (PPT)
- PPT conducts an expert assessment of the need for special education
- The school owner endorses an individual resolution for special education
- The school generates an individual education plan
- The school generates a semi-annual report on the education and the pupil's progress

In this we have a distribution of roles and responsibilities and a chain of actions in which the strength of the chain depends on both the quality of each individual link and the connection between the links. One link builds upon its preceding link and forms the premises for the next.

The chain of actions in special education develops in the vital field between national governance, a municipal context and the culture and professional autonomy of each school. The local authority, which is particularly focussed in this study, has an important task in developing a chain of actions that functions according to national guidelines, while at the same time accommodating local needs. The local authorities must develop guidelines for the chain of actions so that all of those involved take their share of the responsibility, while at the same time viewing their contributions as components of a larger context in which quality development of special education is the objective. The local authorities must therefore seek to stimulate, activate and support the work of developing the quality of special education in each school. The chain of action is thus about both the management *of* the school and a support system *for* the school.

The local school management has the decisive responsibility for a well functioning chain of actions within the school. The management must ensure that the school follows municipal guidelines and finds solutions to accommodate the needs of the school, approaching the staff with corresponding expectations and support. The objective must be for the staff to be committed to improving provision for special education and to collaborate with this aim, viewing this as an important link in the school's collective effort for adapted education.

The chain of actions for special education should accommodate several objectives. It partly pertains to a formal, administrative objective, ensuring that established procedures for the treatment of individual cases are properly accommodated, with the view to endorsing and carrying out resolutions on special education. However, the main objective is of a practical-educational nature in that the chain contributes towards building the best possible system of support for the special education in order to ensure optimal learning conditions for the pupil. The chain of action is therefore also about the management and a system of support *within* the school.

The national guidelines are partly characterised by the need to view the activities within the chain of actions for special education in an ecological perspective. According to this perspective, which is often inspired by a theory based on the work of Bronfenbrenner (1979), mapping and actions should take the child's growth and development into account, in accordance with environmental factors at different levels. This is particularly salient in relation to factors associated with the child's close environment at home, with peer groups, in school and in class. In a set of guidelines on special education from the Ministry of Education and Research (2004), the interaction between work aimed at the individual and system-oriented work is emphasised. Rather than being focused solely on individual problem descriptions, emphasis should be on both individual and environmental factors, and how the interaction between them can influence the conditions for learning and development. Attention should therefore also be given to the learning environment, and thus to the professional and educational premises for individually-adapted and inclusive education.

The planning of adapted and special education should be based on a didactic relational approach, viewing the education as a whole and focusing the interaction between categories from which the teaching has sprung, and the national guidelines are partially characterised by this. Central categories are about objectives, subject content, ways of working and evaluation. In addition, didactic premises belong in this context, in association with pupil competency and frame factors (Bjørndal & Lieberg, 1978). The national curriculum states that adapted education for the individual pupil is characterised by variation in all of these areas of education. Didactic relational thinking is viewed as an important point of departure for the planning of special education, and important decisions and choices must be made in relation to such categories (Ministry of Education and Research, 2004).

### **Method**

The research approach applied in the present study may be characterised as evaluation research (Weiss, 1998), i.e. a systematic collection and analysis of data about the characteristics of a programme as the basis of the estimation and expression of the quality of these characteristics relative to basic criteria. The programme in question in this context is the municipal chain of actions for special education, i.e. the guidelines of this chain.

The chain of actions in special education is a very comprehensive and complex programme to investigate since it comprises many phases as well as the connections between them. Here we analyse a single case of the phenomenon, i.e. the guidelines for the collective chain of actions in one local authority. This case is studied as a consequence of an initiative from the local authority, with a view to evaluating the chain of actions.

A qualitative content analysis of the written documents has been conducted (Krippendorff, 2004), formulating both national and municipal guidelines with regard to the chain of actions for special education. National guidelines are analysed on the basis of the national educational legislation and curriculum as well as guidelines for special education. Furthermore, an analysis of all accessible documents from the local authority referring to the different parts of the chain of actions has been carried out. This refers to circular letters and templates directed at the schools and expressing intentions and requirements concerning special education. The documents are assessed as having a high degree of relevance and authenticity as sources to throw light on the research question. The contents of the documents are analysed and categorised for each phase in the chain of actions, where texts from different documents are viewed in relation to each other with the view to reaching a holistic understanding of national and municipal guidelines respectively.

In the following, the results from the evaluation of the different phases of the chain of actions for special education are presented. The analysis follows a tripartite pattern. Firstly, and for each phase, the main aspects of the content analysis of the national guidelines will be briefly outlined. These guidelines prescribe what the local link should do, thus forming a norm for the practice and a criterion for the evaluation of the quality of the guidelines. An account is subsequently given of the results of the analysis of the municipal guidelines. Then, as the third part of the analysis, a quality evaluation of the municipal guidelines on the basis of a systematic compilation of the two components of the content analysis forms the conclusion. This serves to illuminate how well the municipal guidelines correspond with the national directives for special education.

We assume that this can provide important insights, not just for the local authorities themselves, but also in that it represents an interesting example of how current chains of actions function. Further generalisations of the results must be of an analytical nature. It must be carried out by way of a reader/user-generalisation (Gall, Gall, & Borg, 2007; Wilson, 1979), and will depend on the degree of similarity between other cases and the case in the study with regard to central variables in the analysis.

## Results

### *The teachers' reported concerns and discussions in the special education team*

The first phase in the chain of actions commences at the time when a pupil's learning difficulties are discovered and the teachers begin to think in terms of special education. Furthermore, this phase concerns the way in which the school manages such a reported concern.

In the *national guidelines*, no direct rules for how to formulate and make use of a report of concern are given. However, according to the Education Act, teachers are obliged to estimate whether or not a pupil needs special education and to report to the rector when they consider such a need to exist. This renders it necessary for the teachers to keep track of the pupil's development and to be aware of the pupil's need for support. Neither is it decreed by law that there has to be a special education team in the school. Such a team is nonetheless mentioned in the guidelines for procedures in special education issued by the Ministry, and is considered to be a relevant forum for discussing the teachers' reports about pupil problems. The guidelines emphasise that when a school is concerned that a pupil may need special education it should first evaluate the possibility for improving the ordinary education in order to accommodate the need.

When analysing the *municipal guidelines* to the schools, it can be seen that the teachers' reports about pupil problems are given little scope. It is emphasised in general terms that teachers are obliged to report any eventual needs for special education, and that this should be to a special education team at the school. Nonetheless, the local authority has no concrete guidelines on how the report from the teachers should be formulated and distributed, and there is no common form for this procedure. It appears that the teachers are to report their concerns verbally to the special education team, and thus the teachers become involved and responsible. Where the special education team is concerned, the schools have been requested to appoint such a team in a local authority circular. The rector is to participate in the team so that decisions can be made during the team's meetings. It is decreed in circulars that

adaptation of ordinary education is to be implemented before special education is considered. Consequently, the team must make a judgement about which students can be helped with better adapted ordinary education and which students should be referred to the Educational and Psychological Counselling service (PPT) with requests concerning the needs for special education.

In estimating the *quality of the municipal guidelines*, the initial claim is that they accord well with the legal requirements that teachers are to assess and report needs for special education. The municipal guidelines nonetheless appear to have considerable room for improvement. They would benefit from being given clearer, more concrete formulations, and there should be forms for written reports about teachers' concerns. This would contribute towards acquiring more established routines for such reports, and towards ensuring that information that is normally needed by the special education team is made available. Rendering the reports in writing also reinforces the need to think things through more thoroughly when substantiating the grounds for the concern. Better routines for the reporting may also be important with regard to early discovery and intervention when problems arise.

A special education team appears to be an expedient forum for discussing and coordinating issues pertaining to special education. The balanced judgements regarding pupil cases to be referred to the PPT or for which attempts are to be made to solve these by better adaptation of ordinary education, are a crucial point in the process, and correspond well with the national guidelines. One may thus prevent the referral from appearing as an evasive strategy for the ordinary education, and contribute towards recognition of the necessity to direct critical attention to one's own activity first. Through this prioritising, overburdening the PPT with too many individual cases can also be avoided. It nonetheless appears that it would be beneficial for the local authority to formulate somewhat more concrete guidelines for how the special education team should work, in which such judgements are clearer so as to enable better follow-up by the schools.

#### *The school's referral to the PPT for expert assessment*

If the school is unable to provide the pupil with a satisfactory learning outcome through better adaptation of the ordinary education, the next stage in the chain of actions is to refer the case to the Educational and Psychological Counselling service (PPT).

With regard to the *national regulations*, the PPT is a municipal service imposed by law, and one of its main functions is to provide expert assessments of pupils' needs for special education. In order to carry this out, the PPT is dependent on the material sent by the schools. In the guidelines on special education from the Ministry, one requirement is that the referral from the school must be in writing, and that the local authorities should devise a *referral form*. A *pedagogical report* for each pupil should also be included in the referral. This report should describe and assess both individual factors and interventions that have been tried prior to the referral, as well as the pupil's progress with ordinary education. The Ministry's guidelines make it very clear that the requirement for special education depends on the interaction between conditions associated with both the individual pupil and the ordinary education.

Perusal of the *municipal guidelines* shows that a separate referral form and guidelines on how a pedagogical report should be made have been produced. The information contained in the referral form should include biographical data, a description of individual needs, previously implemented interventions and assessments, collaborators and parental consent. The requirement for information about previously implemented interventions must be viewed in relation to an emphasis in the municipal guidelines stating that only when the school has conformed to the rules for adapted education imposed by law, should the PPT assess whether the pupil needs special education in addition. With regard to the pedagogical report, which should normally accompany the referral, the guidelines describe what the report should contain. The pupil's knowledge, skills and potential for development should be described in some detail, and there should be a clear account of both what the pupil is able to do and unable to do. The pedagogical report also requires an account of how the school estimates its own capacity to provide the pupil with adapted education.

A *quality assessment* of the municipal guidelines for the referral procedures shows that these appear to correspond well with the national norms. The sections covering areas for action in the referral form and the pedagogical report accord well with those prescribed by the Ministry in the guidelines on special education. It appears that both documents clarify routines in a way that is expedient for both the schools making the referral and the PPT receiving the referral. The guidelines can be important for

judgements about which factors determine the cases that should be referred to the PPT. The expectation of a critical view of the school's own capability for adapted education may contribute towards an increased focus on overcoming barriers and improving conditions for learning. The premise that the school must strive towards an awareness of the pupils' resources as well as difficulties may contribute to a holistic impression of the pupils, which it is important to have both for the school itself and for the PPT when further actions are considered.

The requirement that the schools must account for their own interventions to support the pupil's learning may contribute to an emphasis on how special education is not intended as a relief action for the ordinary education, but as an additional effort. The focus on interaction between the pupil's and the school's capabilities is likely to stimulate an ecologically sound evaluation practice, and thus a broader understanding of how the need for special education can develop and be associated with both individual factors and cultural relativity. This is an approach to evaluation that would benefit from further clarification in the guidelines. Taken together, and in a practical-educational perspective, the municipal guidelines appear important. They may be assumed to lead to a demanding referral task, but should nonetheless form a good basis for the PPT to begin the assessment of the need for special education.

#### *The expert assessment from the PPT*

The next stage in the chain of actions for special education comprises the expert assessment from the Educational and Psychological Counselling service (PPT), which is the municipal expert body in cases of special education. An expert assessment is meant to ensure the impartiality, independence and competence in evaluating pupils' needs with a view to providing appropriate educational measures. The assessment is based on the material the school has submitted and PPT's own investigations. The expert assessment will be important both for the subsequent municipal resolution on special education and for the school's further planning of the education.

According to the *national guidelines*, an expert assessment has to be produced before any decisions are made about special education. The Education Act specifies the requirements for the contents of the assessment. On the basis of these, the expert assessment can be divided into two parts: reporting and counselling. Briefly characterised, the reporting should show whether the pupil needs special education, and the counselling should account for the kind of interventions that should be provided to meet the needs of the pupil. The legal requirements entail the PPT focussing on the characteristics of both the pupil and the ordinary education when reports and counselling are given. Among other things, the pupil's benefit from ordinary education must be reported, and advice to assist in solving encountered difficulties with ordinary education extended.

The *municipal guidelines* refer to the requirements for expert assessment in the Education Act and indicate that the assessment should comprise both reporting and counselling. The guidelines make it clear to the PPT that the expert assessment may have two possible outcomes; either that the pupil requires special education or that the pupil should receive support through improvements in the ordinary education. The municipal guidelines place considerable emphasis on the advice that is given to the school about how it should follow up its further work with special education for the pupil. Advice should be given on objectives, content, scope and organisation, and the advice should be sufficiently clear that the teachers can use it as a basis for the formulation of an individual education plan. It is emphasised that if the expert assessment does not meet the school's requirements for advice, the rector should ask the PPT for more specific advice.

Another interesting aspect of the municipal guidelines is that the PPT is also obliged to report on the pupil's need for adaptations with regard to ordinary education, i.e. in the subjects in which the pupil is not receiving special education. In this way, the expert assessment is to consider the adaptation requirements for the entire education, although special education is given the greater emphasis.

In terms of *quality*, the municipal guidelines produced for expert assessment appear to correspond well with the national law. This indicates a satisfactory quality of this part of the guidelines. The guidelines must be assumed to play a role in raising awareness about the relation between ordinary and special education. This partly pertains to how it is emphasised that the outcome need not be special education, but that the pupil should also be supported through improved adaptation of the ordinary education. It also pertains to how the guidelines state that expert assessment should report on both special education and ordinary education. Since most pupils in special education spend most of the time in an ordinary

classroom situation without extra support in the form of special education, the pupils' total learning outcome is strongly dependent on what takes place in these hours as well. It is therefore positive that the municipal guidelines request the PPT's consideration of the pupil's need for adaptations in the ordinary education programme. This directs the objective towards the coordinated efforts between special and ordinary education so that everyone who works with the pupil has a collective responsibility, and undertakes a degree of follow-up.

#### *Resolutions concerning special education*

According to the *national guidelines*, the expert assessment only has an advisory function. A formal resolution is therefore necessary for the pupil to be accorded his or her right to special education. We speak here of single resolutions with the function of clarifying both what the pupil's right to special education is, and the school's obligation to provide it entail. The main rule is that the school owner (the local authority) makes single resolutions about special education, but the rules allow for the option of delegating to the school's rector. The person who makes the resolution is obliged to account for any deviations from the recommendations of the expert assessment.

*The guidelines in this municipality* delegate authorisation to the rector to make single resolutions about special education. The guidelines state that the resolution should be based on the documentation from preceding links in the chain of actions. This particularly applies to the expert assessment by the PPT. This emphasises the importance of safeguarding the preceding phases in the chain of actions by, for instance, the expert assessment providing clear, unequivocal advice.

The municipal guidelines also provide an important clarification on how the resolution should mainly be based on the needs of the pupil, rather than the status of available resources in the school. The local authority has produced its own template for the resolution stating that it should include the content, scope and organisation of the special education. The school is also obliged to substantiate the reasons for the resolution. This can often be done by way of stating that the resolution concurs with the expert assessment. In accordance with the Education Act, the municipal guidelines posit an added requirement for recorded explanations in cases where there is a deviation between the expert assessment and the resolution.

In a *quality assessment* of the municipal guidelines, with regard to single resolutions on special education, the local authority appears to follow up the Education Act in a beneficial way. On the basis of this criterion, the local authority appears to have a high standard for its guidelines. The local authority has produced its own written guidelines concerning resolutions, as well as a template for the formulation and distribution to the parents. The template ensures that the parents are given information about the main aspects of the contents, scope and organisation of the special education.

#### *Individual Education Plans*

With regard to the *national rules*, the Education Act requires that there, as another important link in the chain of actions, should be an individual education plan (IEP) for pupils receiving special education. The main rule is that the IEP is based on the resolution and is in line with the expert assessment. The plan should operationalise the right to special education by showing the objective for and contents of the education and how it should be carried out. At the same time, it is said that the general rules for the subject of education, as they are stated in the national curriculum, apply to special education to the extent they are appropriate. The intentions recommend a coordination of the IEP and the plan for the class.

With regard to the *municipal guidelines*, a template for the structure of the IEP has been produced for the schools' use, as well as guidelines on the procedure. One of the objectives here is for the IEP to follow up the expert assessment from the PPT. In this way, the importance of being familiar with the pupil's adaptive requirements and educational situation is emphasised so as to enable their accommodation through adequate adaptation with special education. At the same time, it is emphasised that the IEP is to be based on the national curriculum, including plans for the individual subjects. The IEP should thus also contribute towards ensuring that the pupil strives for the same goals for competency and with the same subject matter as the other pupils, but only to the extent this is appropriate.

Among other things, the IEP template entails realistic education goals in the individual subjects being set for the pupil, and thereby what kind of competency the pupil should acquire during the course of the

year. The planning of goals should then be followed up in terms of both content and organisation, with a view to how the goals can be reached, thus ensuring coherence in the teaching.

A few other points in the municipal IEP template should be emphasised. One of them concerns how the schools should follow up the requirement for the expert assessment for including material about adaptations within the scope of ordinary education. In the IEP, adaptation needs should also be reported for subjects in which the student is not receiving special education. The other point concerns a requirement in the IEP template stating that as the main rule, periodical work plans should be provided. The IEP must be viewed as a long-term plan spanning the entire school year. At the same time, it is emphasised that consideration must be given to how IEP can be followed up through more concrete periodical work plans during the course of the school year.

The general *impression of the quality* of the municipal guidelines for the work with the IEP is in many ways positive in that they correspond well with, and contribute towards a following through and substantiation of important national decrees. That the IEP is to be based on the expert assessment from the PPT contributes towards the clarification of the dependency between the links in the chain of actions. When the guidelines posit that the IEP should also be based on the national curriculum, this denotes an important and challenging focus on the balance between concern for individual capabilities and common competency goals and contents. We are confronted with important considerations about coordination needs, while simultaneously dealing with challenging tensions between the concern for differentiation and subject-related and cultural inclusion.

When it is said that the goals for the individual subject and school year should be *realistic*, this can be regarded as a follow-up of the legal provision stating that the national curriculum applies to special education, but only as far as is appropriate. One important question is: is the goal for competency suitable; is it realistic for this pupil? The guidelines emphasise an important point; that the goals give the pupil challenges to strive for, but not beyond what they are able to master within the scope of additional support. This will require consideration of what is contained within the pupil's proximal zone of development (Vygotsky, 1978).

When the IEP is made, the guidelines also require teachers to assess needs for adaptations in subjects where the pupil does not receive special education. This may contribute towards increasing awareness in schools about the totality of the concept of adapted education. This is particularly pertinent for the necessity for coordination between adaptation by way of ordinary and special education. This will in turn depend on collaboration between the teachers who engage in special education with the pupil and the teachers who teach classes in different subjects.

According to national intentions, attempts should be made to coordinate the IEP and the education plan for the class. Bearing in mind the structure of the municipal guidelines for the IEP, the connection between the IEP and the plan for the class appears to be an area that would benefit from clarification. However, the requirements for periodic work plans in the municipal guidelines represent not only a substantiation of the IEP, but the simultaneous opportunity to coordinate such periodic plans with work plans for the class, with a view to an educational programme which differentiates and is inclusive. Here, important questions would be: what can the pupil do together with the class, and what must be individually adapted?

#### *The semi-annual report*

According to the *national guidelines*, the Education Act, as the last link in the chain of actions, requires the school to provide a written, semi-annual report assessing the special education, in addition to its continuous evaluation. This semi-annual report is to provide an overview of the education that the pupil has been given, as well as an estimate of the pupil's progress. The semi-annual report is to be sent to the pupil or the parents and to the local authority. This resolution is included in the same paragraph as the regulations for the IEP, something that underlines the connection between the semi-annual report and the IEP.

With regard to the *municipal guidelines*, it emerges that they include both a template and guidelines for the school's semi-annual report. The report is intended to act as an indicator in case there is a change in the pupil's needs in relation to special education, whether the needs have increased or decreased, or have undergone qualitative changes. The guidelines' intention is to combine the semi-annual report and the IEP in a consistent manner. It is said that this semi-annual evaluation is to be a part of the work

with the IEP. It is made clear that both the degree to which the goals for the IEP have been achieved as well as how adequate the interventions have been, are to be evaluated. The template for the semi-annual report is in three parts. First, it requires the school to account for the type of education the pupil has received and second, the pupil's progress. With regard to the latter, the evaluation should concern the individual subject or field covered by the IEP. Third, the template is based on the provision of a comprehensive evaluation of the education and the component goals, including the requirement for adjustments of the special education in cases where the interventions have not been effective. In this context, the pupil's views on education should be ascertained, as well as inclusion and participation in social interaction.

With regard to *quality assessment*, the general impression is that the municipal guidelines for the semi-annual report meet the requirements of the law in a satisfactory manner. It is not only a question of accordance between the national and the municipal regulations, but also about the subsequent follow-up and substantiation in that the guidelines are made operational in a municipal template with accompanying guidelines.

The guidelines will probably contribute towards commitment and systematisation in the school's work with semi-annual assessment. The guidelines are associated with the IEP, which must be viewed as an important contribution towards the coherence of the chain of actions, thus being a reflection of circumstances surrounding the planning, implementation and evaluation of the education. By directing the school's attention to both the pupil's development and the education that the school has effectuated, the guidelines can contribute to a careful reasoning about the interplay between individual and system factors in the learning process. Furthermore, when the template for the semi-annual report requests the pupil's view of the special education, this makes it possible to include the pupil's experiences in the subsequent work. This is particularly the case when inclusion and participation in social interaction is given special emphasis.

### **Conclusions and Discussion**

The chain of actions for special education can be viewed as an expression of the ambition to create a coordinated and collaborative effort at different levels, with the objective of developing a good learning environment for the pupils. The chain of actions is based on the premise that the responsibility for this is shared among several professionals and is developed by contributions from several sectors.

When considering the municipal guidelines for the chain of actions as a whole, the analysis gives the general impression that the local authority provides a good follow-up for the schools, corresponding well with the national regulations, thus facilitating the implementation of the Education Act and regulations through the different links in the chain of actions. The guidelines must be assumed to promote emphasis and substantiation as well as providing advice on centrally-imposed regulations in relation to the schools, thus increasing awareness about them in the chain of actions. Furthermore, it appears that there is a reasonably good concordance between the different links in the chain of actions in that judgements that are made in one link are to be negotiated and promoted in the next link. In this way, the analysis gives the impression of high quality for the municipal guidelines for special education.

Thus the guidelines may encourage improvements of the different phases in the work with special education. This applies to accommodating formal, administrative concerns associated with the procedure of cases as well as practical-educational concerns associated with the development of a system of support for the optimal preparation of a good learning environment.

Although the analysis of the municipal guidelines gives a positive general impression, there nonetheless appears to be a need to go through them with a view to revisions and quality enhancement in some areas. In particular, there appears to be a need to:

- clarify guidelines for the teachers' reported concern and for the special education team
- emphasise the objective of an ecological approach to charting and interventions so that attention is directed towards the interaction between attributes of the pupil and attributes of the environment
- extend and enhance the communication with and within the schools with a view to increasing understanding of and awareness about the guidelines, in order for them to be more collectively and efficiently implemented
- emphasise the responsibility of the rector for following up the work in the chain of actions

- consider and emphasise the consequences of the education having an inclusive objective

The objective of an inclusive education generally appears to have a relatively limited role in the municipal guidelines. This is apparent in that factors associated with adapted education and inclusion is only to a small extent viewed in context. Thus the schools receive little assistance with conducting assessments of the balance between individual premises and the learning community of pupils in special education. One example is the coordination between the IEP and the plan for the school class, where the guidelines are too cursory. Consequently, the guidelines are characterised by little consideration and emphasis where the relation between differentiation and inclusion are concerned, thus only to a limited extent being carried further in the form of advice and guidelines for the schools.

Moreover, in accordance with the national guidelines, the municipal guidelines should further emphasise the issue of teamwork and collaboration between the teachers. It is important to develop an understanding of teachers' joint responsibility for all pupils' teaching and learning, including for those pupils who receive special education. This makes it necessary to underline the cooperation between general teachers and special teachers as a condition for successful coordination between generally adapted education and special education. Teacher cooperation is important in all phases of the chain of actions for special education. This includes the teamwork to formulate and implement individual education plans and to coordinate the education for the school class and for pupils with special needs. The guidelines should thus contribute towards the schools' further developing their understanding of how special education requires a collective professional responsibility.

As in earlier years (Nilsen, 1997), but perhaps now even more clearly, the municipal guidelines for special education are characterised by having the greatest emphasis on the goal category, particularly with regard to IEP work. The other categories are considered as means to reaching the goals. This may be associated with how competency goals have a central position in the national curriculum, which the IEP is obliged to accommodate. This may in turn pertain to an issue we recognise from earlier decades, about how taking precise goals in planning as a point of departure harmonises with how teachers work and think. Perhaps other categories may then become equally central, and dependency and interactions between the different categories should receive more emphasis in the direction of a clearer didactic relational approach (Bjørndal & Lieberg, 1978). According to this approach, accommodation of the pupil's premises and judgements about frame factors will have a central position in relation to the other categories.

Written municipal guidelines on the chain of actions in special education are important, but hardly sufficient. The manner in which schools and teachers relate to written guidelines from superiors is probably also a question of how to communicate with them about such guidelines (Imsen, 2009). Therefore there will be a need to extend, and possibly intensify, the dialogue with the schools in order to develop a common understanding and awareness of the guidelines with a view to strengthening the basis for their practical follow-up.

There may also be reason to pose critical questions about the national regulations, however, with regard to clarity, inner consistency and realism. Although the law defines certain national guidelines for special education, critical questions have been asked about whether this provides sufficiently clear instructional signals from the government to the local authorities and schools. Nilsen (2008) points out that the national curriculum lacks binding guidelines for special education and asks whether this contributes to upholding old cultures so that local traditions tend more readily to determine the practice in the area. If in addition there is no recourse to competency for carrying out the tasks, this will further strengthen the tendency to make use of established traditions and routines.

Viewed as a whole, the chain of actions gives the general impression that the municipal guidelines serve as important criteria for local quality improvement in special education. They are important for ensuring the legal rights of the pupils and their parents. They are also important for ensuring that the ordinary local school is a real choice for parents who have children with special educational needs. If this is to be the case, one is dependent not only on the formulation of municipal guidelines, but also on their implementation. They must function as facilitators in the development of quality in special education. The next important step is that the schools implement the guidelines in such a way that the work in a long chain of actions reaches the pupil and contributes to the development of a system that supports the pupil's learning in a beneficial manner. This question is the subject for the next investigation.

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