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FROM THE HUMAN RIGHTS-BASED APPROACH TO AN ECOLOGICAL APPROACH  
ON HOW TO ACHIEVE SUCCESSFUL INCLUSION IN INTERNATIONAL DISABILITY  
EDUCATION

BY

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DISSERTATION

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## **Abstract**

The barriers that people with disabilities face around the world are not only inherent to the limitations resulting from the disability itself, but, more importantly, these barriers rest with the societal technologies of exclusion. Using a mixed methodology approach, I conduct a quest to revealing several societal factors that limit full participation of people with disabilities in their communities, which will contribute to understanding and developing a more comprehensive framework for full inclusion of people with disabilities into the society. First, I conduct a multiple regression analysis to seek whether there is a statistical relationship between the national level of development, the level of democratization, and the level of education within a country's population on one hand, and expressed concern for and preparedness to improve the quality of life for people of disabilities on another hand. The results from the quantitative methodology reveal that people without disabilities are more prepared to take care of people with disabilities when the level of development of the country is higher, when the people have more freedom of expression and hold the government accountable for its actions, and when the level of corruption is under control. However, a greater concern for the well-being of people with disabilities is correlated with a high level of country development, a decreased value of political stability and absence of violence, a decreased level of government effectiveness, and a greater level of law enforcement. None of the dependent variables are significantly correlated with the level of education from a given country.

Then, I delve into an interpretive analysis to understand multiple factors that contribute to the construction of attitudes and practices towards people with disabilities. In doing this, I build upon the four main principles outlined by the United Nations as strongly recommended to be embedded in all international programmes:

(1) identification of claims of human rights and the corresponding obligations of governments, hence, I assess and analyze disability rights in education, looking at United Nation, United States, and European Union Perspectives Educational Rights Provisions for People with Disabilities (Ch. 3);

(2) estimated capacity of individuals to claim their rights and of governments to fulfill their obligations, hence, I look at the people with disabilities as rights-holders and duty-bearers and discuss the importance of investing in special capital in the context of global development (Ch. 4);

(3) programmes monitor and evaluate the outcomes and the processes under the auspices of human rights standards, hence, I look at the importance of evaluating the UN World Programme of Action Concerning People with Disabilities from multiple perspectives, as an example of why and how to monitor and evaluate educational human rights outcomes and processes (Ch. 5); and

(4) programming should reflect the recommendations of international human rights bodies and mechanisms, hence, I focus on programming that fosters development of the capacity of people with disabilities, that is, planning for an ecology of disabilities and education for people with disabilities (Ch. 6).

Results from both methodologies converge to a certain point, and they further complement each other. One common result for the two methodologies employed is that disability is an evolving concept when viewed in a broader context, which integrates the four spaces that the ecological framework incorporates. Another common result is that factors such as economic, social, legal, political, and natural resources and contexts contribute to the health, education and employment opportunities, and to the overall well-being of people with disabilities. The ecological framework sees all these factors from a meta-systemic perspective, where bi-directional interactions are expected and desired, and also from a human rights point of view, where the inherent value of people is upheld at its highest standard.

*To Daniela, my marvelous mother,  
and to all people who experience disability*

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## Chapter 1

### Introduction, Background, and Argumentation for the Study

“The process and product of making human beings human clearly varie[s] by place and time.” (Urie Brofenbrenner, 1979, p. xiii)

#### Introduction

This chapter describes the key concepts and theories used in this study, starting with the idea of disabilities, inclusion, and following with the notions of human rights, Human Rights-Based Approach for people with disabilities. Then I will describe the segment of population comprised of people with disabilities and their access to education, developing the arguments that support my research questions and hypotheses of this study. For example, one such hypothesis is that democracy could serve as a catalyst for caring and wanting to change the living conditions of people with disabilities. This will set the stage for presenting the methodology questions in the following chapter.

#### Targeted Population and Targeted Processes

The discourse related to disability is complex, and, sometimes, controversial, due to the biological, socio-cultural, and economic contexts linked to it. For example, in special education, the term *disability* is a term that describes an inability to do something or a lack of a particular ability as a result of environment conditions or an impairment, while *handicap* refers to social disadvantages or challenges imposed on a person as a result of a disability (Smith, 2007). To better differentiate between these terms, it is best to describe the levels at which they operate: the term *impairment* operates at a biological or physical level; *disability* operates at the level of function or role of the biological component; and *handicap* operates at the external level of circumstantial factors which decide whether the impairment is a real impediment in the true overall functioning of the person in a given environment. The term *special needs* refers to a

unique educational condition that needs to be addressed in an educational setting. The concept of *ableism* refers to discrimination against individuals who have developmental, emotional, mental, and/or physical disabilities relative to the persons with full abilities (Adams, 2000).

Because people with disabilities are one of the most disempowered and least vocal segment of population, they are amongst the least threatening populace to governments. This caused that measures that address their issues to be considered relatively late in history, as well as in the history of human rights. For example, it was only in the last two decades that the World Health Organization shifted its perspective of disability from medical to developmental approaches and, most recently, to a human rights approach. Despite the fact that there is no agreement in defining disability, and, hence, no cohesiveness in constructing a ‘disability population’, I adopt the World Health Organization’s (WHO) International Classification of Functioning (ICF), ADA, and UN definitions of disability and their view on what constitutes the construct of “persons with disabilities”. The ADA views a person with disability as an individual who either has “(A) a physical or mental impairment that substantially limits one or more major life activities of such individual; (B) a record of such an impairment; or (C) being regarded as having such an impairment” (ADA, 2009). In other words, an individual with disability, as defined by the ADA, is a person who is perceived by self or others as having a physical or mental impairment. The ADA does not specifically name all of the impairments that are covered, as they are not named either by the UN (on their UN Enable webpage, in the Convention for the Rights of People with Disabilities, or in other documents and policies) or by the World Health Organization (WHO). According to the UN,

The term persons with disabilities is used to apply to *all* persons with disabilities *including* those who have long-term physical, mental, intellectual or sensory impairments which, in interaction with various attitudinal and environmental barriers, hinders their full and effective participation in society on an equal basis with others. However, this

minimum list of persons who may claim protection under the Convention does not exhaust the categories of the disabilities which fall within it nor intend to undermine or stand in the way of wider definition of disabilities under national law (such as persons with short-term disabilities). It is also important to note that a person with disabilities may be regarded as a person with a disability in one society or setting, but not in another, depending on the role that the person is assumed to take in his or her community. The perception and reality of disability also depend on the technologies, assistance and services available, as well as on cultural considerations (UN Enable, 2007.)

Under the International Classification of Functioning, Disability, and Health (ICF), developed by the WHO, *disability* represents “an umbrella term for impairments, activity limitations, or participation restrictions” (ICF, 2001). The ICF includes the notions of ‘activities’ and ‘participation’ in the definition of disability in order to allow positive experiences to be described. Within the ICF framework, *disability* represents a continuum of experiences that are likely to affect most people at some point in their lives. Florian, Hollenweger, Someonsson et al. (2006) support the idea that the ICF definition provides a cross-cultural perspective on the education of students with disabilities, because it fosters a “universal” and “interactive” model of disability, as opposed to the rigid classifications currently used in the special education field (Reindal, 2010, p. 156). Further, the Preamble of the Convention of the Rights of Persons with Disabilities (2006) allows for a dynamic image of disabilities as an “evolving concept” and sees disability as an interaction: “disability results from the interaction between persons with impairments and attitudinal and environmental barriers that hinder their full and effective participation in society on an equal basis with others”. I adopt these models of defining disability because, while they all recognize limitations due to impairments, they also acknowledge the importance of culture and social standards (including stereotypes and prejudices) in the ‘making of’ the category of disability. By embracing these three definitions, I acknowledge that all people with short- or long-term, innate or acquired, physical, mental or sensory (and so on) disabilities should have the right to maximize their potential and benefit

from education regardless of the different or unique abilities and the type of society in which they function.

The category of disability is permeable as any typical person can lose any ability. The disabling moment can come at any point in one's life, such as *disability after ability* when people lose some of their abilities as a consequence of traumas or accidents, and *disability before ability* for people born with some type of disability. Thus, the genealogy of disabilities indicates the origins and the development of a syndrome, viewed as a set of characteristics that indicate a specific disease or disorder, from prenatal (genetic), perinatal (during the time of birth), and postnatal to late age (developmental disorders, accidents, or war victims). Disabilities can manifest themselves as visible, for example physical disabilities or legal blindness, or invisible impairments, for example mental disorders, and they can take the form of developmental delays or irregular development, such as forms of Autism Spectrum Disorders that present splinter skills. Mental disorders include, but are not limited to, schizophrenia, bipolar disorder (referred to as severe mental disorders), epilepsy, depression, anxiety, somatoform disorders, alcohol and substance abuse disorders and child and adolescent mental health problems.

*Education* refers to the processes of teaching and learning. While formal education usually implies face to face interaction with the teacher, the informal educational process refers to outside classroom learning, such as parts of the vocational education (Gujjar, Naoreen, & Aslam, 2010). In general, *special education* means modified or adapted instruction that meets the particular needs of students with unusual learning needs, including autism spectrum disorders (ASD), learning disabilities (LD), intellectual disability (ID), attention deficit hyperactivity disorder (ADHD), emotional or behavioral disorders (EBD), communication disorders (CD), deafness, blindness, traumatic brain injury (TBI), physical disabilities, and giftedness (Hallahan

& Kauffman, 2003; Friend, 2008). In developed and several developing countries, there is usually a special education network that provides specialized services for all levels of disability severity and at all levels of schooling from nursery and kindergarten to professional schools.

In an educational context, *mainstreaming* is a temporal placement of students with diverse abilities in regular classes during specific time periods, while integration is used to mean other planned interactions between students (Salend, 1994). *Integration* refers to the act of physically putting a child with special needs in a mainstream educational environment and providing the needed support, while *inclusiveness* implies the non-discriminatory acceptance of all individuals in educational and social settings, providing equal learning opportunities, and welcoming diversity (Popovici, 1998; Porter, 2008; Slee, 1986). Inclusion policies adopt a zero rejection rule, advocating for the education of all students in age-appropriate regular classrooms, which they would normally attend if they did not have a disability (Salend, 1994).

In Europe and the United States, there are five known models of organization of integrated education: (a) cooperation between special and regular schools, (b) self-contained classrooms in a regular school, (c) resource room, (d) itinerant professor, and (e) common model (Popovici 1998). On the other hand, some authors identify four different types of special education instruction that can be implemented in inclusive schools (Snell & Brown, 2010; Snell & Janney, 2005): (a) general education teacher with team planning and suggestions from special education teacher, when the student with disabilities is taught in a general education classroom by a general education teacher, at the same time with nondisabled students, and with the same or adapted methods; (b) collaborative teaching, when general and special education teachers are teaching all the students in the general classroom for sequences of the day; (c) pull-in with collaborative teaming, when all students from the general classroom are involved in the same

activities, but students with disabilities receive support from special education teacher; and (d) pull-out with collaborative teaming, when students with disabilities are taught in a different setting than their nondisabled peers for specific reasons.

Prejudice, lack of supports, and other socio-cultural and economic factors consistently limit participation of people with disabilities in mainstream society may be consistently limited for people with physical and mental disabilities, as well as for people who are otherwise disadvantaged by birth or background, such as a low social-economic status (SES), diverse racial and ethnic heritage, and misinterpreted, misunderstood, or unprepared for the mainstream society, hence, many times categorized as having disabilities. Hence, the marginalization of people with disabilities can stem either from their visible or invisible disabilities, or from societal factors, such as prejudice and lack of support, which can also limit participation in the mainstream society. Good examples of minorities overrepresented in special education tracks are African-Americans in the United States, Roma in Romania and other European countries (see Walker, 2008).

Currently, there is a global trend of disability policies pushing for social and educational inclusion of people with special needs, rather than limiting their experiences to physical integration (Armstrong & Barton, 1999). This is recognized as a progressive step towards accepting diversity. Because education is the outcome of the interconnectedness of the circumstance-specific (social, economic, cultural, and historical) factors, it should be seen within the context of equity of opportunities, social justice (Barton & Armstrong, 2007), and, ultimately, human rights. Today, *equity*, viewed as social justice and a reflection of human rights, rather than *equality*, the mere equalization of opportunities, should be targeted in the

inclusive education discourse and practices, for the benefit of not only the individuals with special needs, but of the entire society.

In this study, I include *vocational education* or employment training, *rehabilitation education*, and *lifelong learning* in my discussion of educational rights. The achieved level of education can affect the likelihood of acquiring employment in different ways. First, labor skills training, along with the degree of availability and supports and accommodations on the job, determine the kind of job a person with disabilities will perform and be paid for. On the other hand, the higher the level of education, the greater the potential of obtaining a safer working environment, thus preventing a person from acquiring disabilities. Also, a better salary allows a person to obtain better medical treatment in case of an injury or illness and to contribute to better medical care in order to enable people with disabilities to minimize secondary conditions and maximally contribute to society. Finally, education may contribute to greater knowledge on how to prevent and treat certain disorders and is conducive to a higher quality lifestyle.

## **Background**

**People with disabilities as a disempowered ecodeme.** As already established in the environmental literature, the term *ecodeme* refers to a stratus of population occupying any specified ecological habitat (Oceanography Dictionary, 2010). Although the term *deme*, referring to “a local population of closely related interbreeding organisms” (cf. Merriam-Webster online dictionary), invokes genotypic and phenotypic relationships among the members of a population, I am using the term *ecodeme* as a metaphor for the common factors the people with disabilities share: (a) unique abilities; and (b) challenges they encounter in society. In this sense, genetic traits and biological interbreeding are not welcomed into this socio-cultural discussion. Instead,

social discourses of inclusion and exclusion, conversations on societal barriers to collective and individual development, and dialogue on removal of obstacles are invited.

James M. Kauffman was one of the first to analyze the segregation of people with disabilities as a rationale embedded in ecological systems, including the human social ecosystem, meant to serve the ultimate purposes of species survival and equilibrium: “Congregation and segregation of individuals (which are not peculiar to homo sapiens) are two means by which ecologies, including human social ecologies, are constructed and maintained” (Kauffman, 1993, p. 6). Hence, as defined by Kauffman, “an ecodeme is a population occupying a particular ecological niche. In sociobehavioral ecology, the ecodeme is comprised of the group occupying the location and forming the community and structure within which an individual of interest might be introduced or from which an individual might be rejected” (p. 7). In this study, I will refer to the people with disabilities, with disability defined in a broad sense (as described by the ICF, UN, and ADA), as an ecodeme that occupies a distinct place in the human ecosystem, due to their distinct abilities. Unfortunately, the niche or the habitat of this ecodeme became pre-established due to low-profiling caused by marginalization, discrimination, lack of resource availability, and prejudices that still characterize some societies and communities today.

Although the definition of disabilities is not consistent across different sources (institutional) and across regions or continents (socio-cultural), I will attempt to use the available data on disabilities to estimate and point out the extent of pervasiveness of the phenomenon of disability. Many times, the sources cited do not divulge the degree of generality or narrowness of the definition of disability that they use to aggregate their data. International sources estimate that, worldwide, approximately 10-12 per cent of people (or 650 million people) have at least one type of disability (World Bank Disability, 2009), which means that at least 1 in 10

individuals are disabled (UN Enable, 2009). A most recent WHO and World Bank report (2011), in fact the first World Report on Disability, released on June 9, 2011, announced a staggering percentage of 15 of the world's population that live with significant disabilities, and over 1 billion of people who live with some form of disability. The number of people with disabilities is on the rise due to, in part, an increase in world's population, chronic diseases, injuries, malnutrition, war and violence, AIDS, environmental degradation, and ageing. Of the total number of people with disabilities, approximately 200 million are children, subject to receiving formal education (WHOa, 2010). UNESCO (2010) reports that of the 75 million primary age children who do not attend school, one third have disabilities, thus, "children with disabilities make up the world's largest and most disadvantaged minority." Over 90% of children from developing countries do not go to school and in some countries only 1 or 3% of the adults with disabilities are literate. Because the extent of the discourse of disability, disability may be a more pervasive factor than it is perceived at the moment. In addition, many more people are affected by the presence of disability within their immediate social circle, that is, an estimated of at least 25% of all people (UN Enable, 2009), and ultimately, the entire society.

In Europe, the current statistics raise to 65 million the number of people with disabilities, which represents roughly 1 in 6 people that live on this continent (European Disability Forum - EDF, 2010). The European Disability Forum (2011) defines disability as "the result of the interaction between the individual's impairment and the barriers created by society (be social, environmental and attitudinal)." Unfortunately, aggregate data on pupils with disability that attend primary education is not available for the European Union. In fact, public availability of aggregate and disaggregate data on national, regional, and global accessibility to education of children with disabilities is problematic entirely. The most recent UN Disability Statistics

Compendium was published in 1990, and includes census data collected from 1975 to 1983 (UN Secretariat, 1990), and the same data are available on the UN DISTAT database (2010).

Moreover, many data entries are left blank. From the World Health Organization (WHO) we learn that an indicator needs to be sufficiently important in the national policy agenda to be included in the country census questionnaire. Hence, for the disability statistics not to be omitted, enough internal and external pressure needs to be exerted on the nation-states' governments.

In the U.S., according to the U.S. Census Bureau, in 1997 there were 52.6 million people (or 19.7% of the U.S. population) that had some level of disability and 33.0 million (12.3%) that had a severe disability. These numbers show that people with disabilities are the largest minority in the U.S., compared to the 15% Hispanic population, 14% African American minority, and Asian heritage immediately following (NOAA, 2005; US Census Bureau News, 2008). Under the Individuals with Disability Education Act (IDEA), in 2007, 95% of 6- to 21-year-old students with disabilities received free public education in regular schools, 3% received services in a segregated school, 1% attended regular private schools, and less than 1% were served in one of the following environments: a separate residential facility, homebound or in a hospital, or in a correctional facility (IES, 2010).

The UN Youth webpage asserts that, indeed, “despite being the world's largest minority, persons with disabilities are largely ignored” (Youth and the United Nations, 2009). Due to inconsistent and comparable cross-country data collection, there are no data collections and no data estimations on disaggregated country data about people with disabilities in the past decade, i.e., how many have access to education, how many are employed, how many live in poverty, what types of disabilities are serviced, and so forth. Based upon macro-longitudinal and case study research on the socio-cultural and economic characteristics of the populations with special

needs, we can estimate that this ecodeme (i.e., segment of population) has little to no hopes for employment or a fulfilling life in many parts of the world (this idea is supported with evidence in the following paragraphs). Thus, persons with disabilities are exposed to a higher risk of poverty and, in turn, people with a low socio-economic status (SES) undergo a much heightened rate of disabilities (UN Enable, 2009). As such, preventable disabilities and better functional participation of people with disabilities are targeted by economic development, and prevention and treatment means, which are represented by access to education and health care. Societies tend to pathologize behavior and skills that cannot be elicited at request or that may require special training to become manifested, hence, people with disabilities remain one of the most disempowered ecodemes of the marginalized. However, social handicaps can be prevented and reduced by an increase in awareness and focus on education about such persons, which can be achieved mainly through socio-cultural (including mediatic) and political means.

It has been established that disability is both a cause and a consequence of poverty, with about 80% of global population with disabilities living “in low-income countries and experience social and economic disadvantages and denial of rights” (WHOa, 2010). The World Bank reports that 20% of the poorest people worldwide have some kind of disability (USAID, 2009). Poverty sets at risk disempowered populations which cannot exert agency for themselves and those dependent on them (Wines, 2006). The countries with greatest number of identified disabilities are also the poorest countries in the world and are at more risk of having future generations of youngsters who will be cheated of IQ points. Lack of iodine alone can “lower a child’s IQ by 10 or more points” (Wines, 2006, p. 101). Similarly, lack of vitamin B12, vitamin A, iron, and folic acid are caused by hunger in both underdeveloped and industrialized countries and fundamentally impact the health of young children. In citing a study performed by Caulfield et

al., Scharnberg (2006) presents compelling evidence of the ravages that famine brings among the hungry: “among individual diseases studies, undernutrition is responsible for 60.7% of deaths from diarrhea, 57.3% of deaths from malaria, 52.3% of deaths from pneumonia, and 44.8% of deaths from measles” (p. 112), and in general malnutrition increases the susceptibility to illness and the likelihood that an illness will be serious. Short term and long term consequences of food insecurities include impairments in mental health, physical diseases, school dropouts, and absenteeism from work, although nutritional deficiencies “can be easily and cheaply prevented, sometimes for pennies per child, through programs like universal salt iodization, fortification of flour, and semiannual doses of vitamins” (Wines, 2006, p. 103). In general, “three fourths of the world’s hungry are politically marginalized people who live in rural areas. Within the family, women and children are the most likely to go hungry” (Sechler, 2006, p. 6). Four out of every five people for whom hunger is fatal are women and children. Hence, people with disabilities are often multiply discriminated, first for having a disability and then for being poor and/or women.

WHO reports that under-nutrition is the cause of death for at least 30% of all children under age five, with approximately 20 million children severely malnourished. Problems that contribute to under-nourishment include inadequate breastfeeding, inappropriate food, lack of access to highly nutritious foods, common childhood diseases that affect a child's ability to eat or absorb the necessary nutrients from food (WHO, 2008). In many developing countries, women are the ones who need to prepare food for income and who also consume street foods with negligible sanitation standards (e.g., Tinker, 1997). These street foods are highly susceptible to foodborne diseases that can breed serious diseases and even epidemics resulting in temporary or life-long disabilities. From a bioethics perspective, the WHO announces considerable progress in drinking water, but also a need for improving sanitation, and a need to grasp the extent of

foodborne diseases. Approximately 87% of the world's population, or 5.9 billion people, currently use safe drinking-water sources. On the other hand, 39% of the world's population, that is, over 2.6 billion people live without improved sanitation facilities, which increases the risk to contract diseases that lead to disabilities (WHO, 2010). Carrying water for long distances can lead to physical disabilities. Due to increasing "industrialization and trade of food production, the rapid urbanization associated with a more frequent food preparation/consumption outside the home and the emergence of new or antibiotic-resistant pathogens," foodborne diseases are spreading. They are "the result of ingesting contaminated foodstuffs, and range from diseases caused by a multitude of microorganisms to those caused by chemical hazards" (WHO, 2010). Due to the scarcity and fractional mode of gathering data (i.e., reporting only some of the following factors: morbidity, mortality, severity, and duration of the disease) and due to under-reporting, a full picture of the incidence of food borne diseases is not yet available from the WHO.

Poverty also takes its toll on people in the form of mental disabilities. For example, "people with the lowest socio-economic status (SES) have 8 times greater relative risk for schizophrenia than those of the highest SES. They are also 4 times more likely to be unemployed or partly employed, one-third more likely not to have graduated from high school" (WHO ECOSOC, 2009). A discussion paper published under the WHO, for a meeting of the Economic and Social Council (ECOSOC), lays out international and country cases data on *Mental Health, Poverty, and Development*: "Globally, only 5% of children with physical or mental disabilities complete primary school compared to nearly 90% of their non-disabled peers. In developing countries, 98% of children with disabilities are not enrolled in school and 99% of girls with disabilities are illiterate" (p. 5). Many times, the infrastructure for the education of people with

disabilities is lacking, and their access to education is denied. Other times, children and adults with mental disabilities are institutionalized without educational services. When they receive educational opportunities, people with disabilities “are often discriminated against, rejected, and ridiculed in school” (p. 5). During school years, findings suggest that students with mental disabilities share a low motivation, low concentration in classes, poor academic performance, and a high rate of drop-out. Furthermore, “[o]f all disabilities, mental illness is associated with the highest rates of unemployment (up to 90%) leading individuals into economic poverty and depriving them of social networks and status within a community” (p. 5).

Girls and women are among the poorest in their communities, and the survival of the women with disabilities is threatened by disenfranchisement. For example, between 60 to 80% women in most developing countries work on cultivating the land and women alone are responsible for half of the world’s food production (FAO, 2010). Despite this, women have more difficulty than men in accessing resources for food production (agricultural inputs), low purchasing power (such as credit), low or null land and property ownership rights (e.g., FAO, 2010, holds that less than 2% of land is owned by women in developing countries; and Chen & Summerfield, 2007), and low access to education, training, extension services, research, and technology. The situation of women with disabilities who live in rural areas is worse than those who live in urban communities, due to lack of information about available services, lack of independency, lack of means to mobility, an increased reluctance to ask for help, and an increased learned helplessness due to multiple ways of isolation.

Inequality even within the ecodeme exists also. There are considerable gaps in treatment of people with disabilities versus people without disabilities, but the gaps grow in the cases of multiple bases of discrimination, groups that are especially vulnerable because of the

superimposition of two or more factors including gender, indigenous peoples, ethnic and racial minorities, migrant workers, refugees, children, older persons, and people with HIV/AIDS. Within the population with disabilities, this difference in equality is expressed in valuing men over women, boys over girls, Whites over other ethnicities, and so on. For example, in South Africa, 19% of the White people with disabilities are employed full time, while only 6% of Africans and 4% of other Colored populations occupy full-time positions (SignGenius, 2010). In a study on Central and South Eastern European countries, the unemployment rates of Roma population ranged from 44.5% in Romania to 73.2% in Kosovo in 2004 (O'Higgins & Ivanov, 2006), places where the employment of people with disabilities is extremely low anyway.

Traustadottir (2010) notes that, according to Kutza (1985), women with disabilities are at least double discriminated when it comes to employment: either they are not given the chance for employment or, if they are hired, they are paid less than a man for the same type of job. A third discrepancy in employment treatment is represented by lower and fewer work benefits than men, such as “supplemental security income, disability insurance, worker's compensation, and vocational rehabilitation.” The International Labor Organization (ILO) reports that women have an increased risk of becoming disabled due to neglect in healthcare, poor workforce conditions, and gender-based violence (USAID, 2009).

DAWN Ontario (2010) organization finds that girls with disability are twice as likely to be sexually assaulted, women are more likely to be victims of violence, and the unemployment rate of women with disabilities is approximately 74% in Canada and 100% in many developing countries. As shown by studies in institutionalization and adoption, the socialization of children is crucial for their cognitive and emotional well-being. While investments in health and education are higher in boys than in girls, the girls with disabilities are provided with the least

attention and care in the family. Hence, girls are more likely to acquire disabilities and girls with disabilities are more likely to die than boys (UN ESCAP, 1998). Girls with disabilities would highly benefit “from contact with disabled women who can act as role models” (DAWN Ontario, 2010). Girls with disabilities are also more likely to be recruited and forced into sex trafficking. Girls and women with various disabilities are more susceptible to be lured and convinced into entrusting themselves to strangers or submitting themselves to high risks sometimes due to their low ability of complex and comprehensive analysis, inability to read social cues, or their sense of credulity and inclination to believe that everybody is well-intentioned, depending on their disability.

Complications of pregnancy account for almost 15 % of deaths in women of reproductive age (see for example, Kristof & Wudunn, 2009). Overall, over half million women die from preventable complications during pregnancy or childbirth (WHO, 2008), but many women who survive pregnancy and birth may be left with disabilities as a result of these events. Because of lack of sanitary conditions, the chance of giving birth to a child with disabilities is high. MacInnes found that women who have their first child with disabilities are more likely not to have subsequent children (2008) either because they dedicate their efforts and savings to take care of the child or because they or their family blames her for the disability of the child. Simon (1988, as cited in Traustadottir, 2010) found that only 49% of women with disabilities get married. Married women with disabilities are even more constrained than women without disabilities to remain in an abusive relationship due to the small probability of being able to support themselves financially, hence potentially developing co- morbidity (i.e., superimposed disabling conditions, such as physical disability and depression). In many countries, services for mothers with disabilities are either scarce, inaccessible, or they do not exist entirely.

Traustadottir (2010) notes that the uneducated or biased members of society still fear that mothers with disabilities will give birth to children with disabilities, although it is scientifically proven that few disabilities are hereditary.

In the context of the recent paradigm shift from the medical model to the social model, the world needs to pay attention to the socio-political circumstances, which, in turn, influence or even determine the economic status of people with disabilities. Examining disability from a developmental framework suggests looking at access to education, training and employment, health related services, and SES level. The Millennium Development Goals (MDGs) take into consideration all these factors, and place at their center commitments to human rights and development. Although the words “disability”, “impairment”, or “handicap”, are not mentioned, the MDGs directly target some of the causes of disabilities, preventing impairments and disabilities, by ending poverty and hunger (Goal 1), providing universal access to primary education (Goal 2), advocating for gender equality (Goal 3), and ensuring child health (Goal 4) and maternal health (Goal 5). The remaining 3 goals, combating HIV/AIDS, establishing environmental stability, and laying the foundations for global partnerships, are all also indirectly related to preventing and treating temporary or life-course disabilities. As shown above, the two factors that impact the most the success of the ecodeme with disabilities are anti-poverty objectives (hence, access to healthcare) and access to education. Disability rights violations are generally both a cause and a consequence of poverty, through disempowerment and exclusion.

### **Argumentation**

This sub-section serves as a justification for the line of reasoning I adopt in the mixed methodology, discussed in the following chapter. I look at factors that are related to the context of disability issues, especially the inclusion of people with disabilities in society through

educational processes. Historically, the discourses of integration and inclusion have been framed in terms of 'education for all' and human rights. Since there is no Human Rights Index data available, I examine three factors that are interrelated but do not superimpose on each other, and that could be part of a potential Human Rights Index: education, democracy, and human development.

I find three important variables to be relevant to the issue at hand and included in my quantitative analysis, namely (a) the Human Development Index, which contains a measure of human rights, (b) the World Government Indicators, which reflect the enforcement of human rights, including disability rights, and (c) the national level of education through which respect for human rights can be embedded into mainstream mentality. These will constitute the *independent variables* from the quantitative analysis of this study. Another variable that may have a strong relationship with human rights is the level of progress on MDGs, but a quantification and aggregation of the eight goals would be very complex, controversial, and it would render too many hypotheses to be tested. Hence, I decide to retain only the three main independent variables identified above.

Impairment and disability were and always will be part of human reality. The question that remains pertains to how does the society deal with this reality, namely how does the society prevents handicaps from developing and how are they handled when they exist. As shown earlier, the term disability suggests an incapacity to perform a function due to an impairment. However, because the way that function *should be* performed is dictated by societal standards, it follows that a disability becomes a handicap under certain circumstances, but cannot present challenges in other contexts. For example, in a society where writing with the right hand is a required standard, the physical lack of the right hand can become a *contextualized disability* or,

even worse, a ‘handicap’ if the mechanism of compensation is not encouraged, in this case writing with the left hand. Also, because the term handicap became pejorative, in everyday practice, sometimes the term disability is used as a synonym for handicap, although not academically (scientifically) interchangeable. Hence, since ‘disability’ and ‘handicap’ are contextualized terms, at the intersection of historically contemporaneous and circumstantial factors, I chose as *dependent variables* two indices that are representative of the contextualization of disability and that pertain to the attitudes of the society towards people with disabilities: the concern for and preparedness to improve the conditions of people with illnesses and disabilities. The Concern for people with disabilities variable is connected to human rights at a moral-ethical level, and the Preparedness to change the conditions for people with disabilities reflects the civic responsibility that every citizen should have for their community and a sense of agency that is usually acquired during formative years through formal education (in schools) and informal education (outside school settings, including a child’s home). As I analyze the importance of human rights for human development, democracy, and education, I will deduce the logical hypotheses that arise from my discussion.

**Human rights and the Human Rights-Based Approach to education for people with disabilities.** Genealogically stemming from theories of divine, natural, and, finally, legal rights (Waldron, 2000), human rights reflect a framework of constructivism and legal interpretivism. Natural laws are the unwritten and immutable laws, presumed to be instinctive to all human beings, and are derived from nature, the divine, or the universe. Stoics believed that natural law stems from reason, thus recognizable only by human reason, and from a set of moral principles common to all humankind (Dolhenty, 2003). Natural laws gave rise to natural rights, which in turn are the basis for human rights and are based on the moral values of the society at a given

point in history (Quinn & Degener, 2002). On the other hand, positive rights are man-made laws, which legal laws and rights are derived from. A right is a “legitimate, valid, justified” claim, which means that it is “desirable or necessary”, and seen as “benefits deemed essential for individual well-being, dignity, and fulfillment, and that reflect a common sense of justice, fairness, and decency“ (Henkin, Cleveland, Helfer, Neuman, & Orentlicher, 2009, p. 43). The key principles of international human rights law include (a) universality and inalienability, meaning that all people, everywhere, anytime are entitled to those rights; (b) indivisibility, referring to the equal status of human rights for everyone, without a hierarchical order; (c) interdependence and interrelatedness, concerning the fact that each right contributes to the person’s dignity and the fulfillment of his or her life; (d) equality and non-discrimination, invoking the inherence of these rights in each human person, regardless of “race, colour, ethnicity, gender, age, language, sexual orientation, religion, political or other opinion, national, social or geographical origin, disability, property, birth or other status”; (e) participation and inclusion, concerning agency in the decision-making processes that affect his or her life; and (f) accountability and the rule of law, denoting that all duty-bearers, including states, are answerable to the application of human rights within the legal norms and standards established in the international human rights treaties (UNFPA, 2010).

Following the Holocaust of World War II, the international community began in 1948 to revise previous international conventions (such as the Geneva Conventions and the Hague Conventions), and culminated its debates with the adoption of the Universal Declaration of Human Rights (UDHR) in 1948 (Douzinas, 2000; Human Rights Educators' Network, 1998). The end of the Cold War did not deter the development of the human rights system, but it did slow it down (Nickel, 2002). The UDHR set the standards for human rights practices, which

were further reinforced and refined by the International Covenant on Economic, Social and Cultural Rights and by the International Covenant on Civil and Political Rights. These were followed by conventions relating to slavery, torture, genocide, discrimination, religious rights, and children's rights, and recently, disability rights. Thus, disability rights followed a long continuum of generations of rights issues. Recently, the Convention on the Rights of Persons with Disabilities (CRPD) and its Optional Protocol was drafted on previous efforts to establish the need for people with disabilities to be guaranteed their rights without discrimination.

The well-being of people with disabilities is a social issue that remains at the level of the general public, across institutions and states. It constitutes a clash between collective and individual rights, and positive and negative rights (involving individual human agency or not; Henkin et al., 2009). Collective rights refer not only to protection against discrimination on the basis of identity, but also to an aggregation of positive rights related to basic human needs, such as the right to a clean environment (air and water), the right to food and housing, and some would add, a right to live in a secure and peaceful society. And then there are the rights of individuals living within states to be free from arbitrary, discriminatory, and inhumane treatment at the hands of their governments. Many of these rights are captured by the idea of negative rights, with the Bill of Rights in the U.S. Constitution being an exemplary case of protecting individuals from random uses of government power. Thus, these rights, i.e., negative political and civil rights, group rights, and positive rights, constitute three different generations in the development of human rights.

The right to education, as a social right, is universal and inalienable, and it has been embedded in international and regional conventions, therefore holding ratifying states responsible for its delivery. The Committee on Economic, Social and Cultural Rights establishes

in the General Comment No. 13 the right to education for all persons, and the importance of education as “the primary vehicle by which economically and socially marginalized adults and children can lift themselves out of poverty and obtain the means to participate fully in their communities” (OHCHR, 1996-2007). These and other international human rights treaties, set up educational entitlements for free, compulsory, and non-discriminatory primary education for children, with the obligation to develop secondary education. The right for quality education has been established in the UN Declaration on the Right to Development (A/RES/41/128) from 4 December 1986. The availability of educational opportunities, as instructional services at public expense, also implicates civil, economic, and cultural rights (Henkin et al., 2009).

The technical and vocational education is also emphasized as a means of helping "to achieve steady economic, social and cultural development and full and productive employment", and on the grounds of the Universal Declaration of Human Rights (UDHR) that this type of education linking the right to education with the right to work “shall be made generally available” (OHCHR, 1996-2007). The question to higher education is answered that it “shall be made equally accessible to all, on the basis of capacity” (Art. 13, OHCHR). Hence, education, especially primary education, is a basic civil and socio-cultural right (even a developmental right) essential to the individual development in a knowledge society. Article 26 of UDHR states explicitly that, beyond primary education, accessibility is based on merit and is not mandatory: “Elementary education shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible to all on the basis of merit” (UDHR, Art. 26 (1).)

Human rights obligations are of three kinds: respect, protect, and fulfill basic entitlements. Limitations of and derogations from rights are allowed only in times of public

emergency, national security, or public order. Henkin et al. (2009) argues that resistance to the idea of rights stems from the opposition to the individualism rooted in the individual freedoms and autonomy, to the fact that the society must tend to these rights, and, “above all, that the individual’s rights might frustrate the will of those in authority, and ‘trump’ the public good as determined by them” (p. 99). In the case of educational disability rights, controversy may arise regarding their priority in the national order in developing and poor countries when it comes to costs of education and rehabilitation through education, and in countries with a socialist ideology where the well-being of the collective supercedes that of the individual. Human rights can be interpreted as having two components: (a) moral or ethical, and (b) legal or political. According to Kreide (2005), there is usually only one moral interpretation but various political meanings brought about by the interplay of collective and individual identities and political power. The complexity of political and legal interpretations can bring about abusive uses or misuses of human rights as an instrument of power. The moral aspect of rights should be best of use for the policy development stage of educational programmes for people with disabilities, whereas the political and legal facet can be used in the monitoring, enforcement, and implementation phases.

**Human Rights-Based Approach.** Many materials have been published emphasizing the Education for All principles, but the Human Rights-Based Approach (HRBA) represents a step forward in an effort to promote human rights and highlight the importance of universal access to primary education. In 1997, the UN Secretary General, Kofi Annan, introduced a human rights perspective into the work of all United Nation agencies, and consolidated the institutional role of the Office of the High Commissioner for Human Rights as part of this reform. In 2007, United Nations Children’s Fund (UNCF) and United Nations Educational, Scientific, and Cultural Organization (UNESCO) developed a guide for the *HRBA to Education for All*

(UNCF/UNESCO, 2007), where the education of children is emphasized, and the education for children with disabilities is briefly discussed. The principles that characterize an HRBA are similar to the ones any right holds: (a) universality and inalienability; (b) indivisibility; (c) interdependence and interrelatedness; (d) equality and non-discrimination; (e) participation and inclusion; (f) empowerment; and (g) accountability and respect for the rule of law (UNCF/UNESCO, 2007).

The HRBA to education requires that the underpinning causes of poverty and inequality in schools need to be addressed, reflecting human rights values, such as dignity and respect. Both processes and outcomes should be targeted, that is, both service delivery and the capacity development and agency through empowerment. However, empowerment is viewed not as a strategy in itself, but more of an aspect of any strategy, such as the strategies of advocacy, capacity-building, and service delivery. Within an HRBA, education is considered a means to reduce poverty disparity and an opportunity to self-achievement and “education programmes should respond to need but must also take account of the rights of children, young people and other learners”, incorporating, thus, vocational and life-long training (UNCF/UNESCO, 2007, p. 15). While the HRBA model promotes *education through human rights*, the UN World Programme for Human Rights Education developed in December 2004 advocates for the implementation of human rights education programs locally, regionally, as well as internationally, in order to advance a common understanding of the *human rights principles through education*.

In the *Statement of Common Understanding*, adopted as the result of inter-agency negotiation called upon by the 1997 UN reform, the objectives and methodological framework of this approach were described for their use in the development and programming of human rights-

based plans, strategies, and policies. Several factors were identified as “necessary, specific and unique to a rights-based approach and [that] can be used for policy and programming in the education sector”:

1. Assessment and analysis identify the claims of human rights in education and the corresponding obligations of governments, as well as the immediate, underlying and structural causes of the non-realization of rights.
2. Programmes assess the capacity of individuals to claim their rights and of governments to fulfill their obligations. Strategies are then developed to build those capacities.
3. Programmes monitor and evaluate both the outcomes and processes, guided by human rights standards and principles.
4. Programming is informed by the recommendations of international human rights bodies and mechanisms (UNCF/UNESCO, 2007, p. 13).

As part of the UN conceptualization of the HRBA for people with disabilities, this framework consists in removing the social, economical, and even physical barriers (universal design in architecture) to allow an active participation in their lives and their communities. “Key to a rights-based approach to disability is the idea that the inability of disabled people to participate fully in the life of their communities is not to be attributed solely to the limitation of function resulting from their impairment” (Lawson, 2006, p. 4). This model adopts a social view of disability, where exclusionary barriers lie outside the individual. In the case of educational access, then, the physical and social barriers are the teachers, sometimes parents, school policies, education laws, transport, educational support outside school, etc. that contribute to the disabling of people with impairments. In conclusion, the HRBA to disability model in education is an impetus for simultaneous changes at all levels of education and of the disability spectrums, due to the indivisibility character of human rights.

*Based on this discussion, I hypothesize that the level of education of the population from a given country can explain its concern for people with disabilities and its readiness to improve the quality of life for people with illnesses and disabilities.*

**Human rights and democracy.** In this section I argue that democracy is the strongest catalyst for human rights, because it involves freedoms, such as freedom *of* (religion), freedom *to* (speak, assemble, housing, food), and freedom *from* (detention, torture) (Henkin et al., 2009).

U.S. president Abraham Lincoln (1809-1865) encapsulated these freedoms in this way:

“Government of the people, by the people, for the people”. Hence, values of universal adult suffrage, fair elections, pluripartitism, more than one source of information, and respect for human rights are essential characteristics of democracy (Morlino, 2002; UN, 2009). Similarly, O’Donnell (1999) believes that, underlying democracy, there are the core concepts of fair elections, responsibility (accountability) of the state, and freedoms of expression, association, and protection of individual rights. Morlino (2002, p. 4) considers “a quality or good democracy to be one presenting a stable institutional structure that realizes the liberty and equality of citizens through the legitimate and correct functioning of its institutions and mechanisms”.

The link between democracy and HR is encapsulated in article 21(3) of the Universal Declaration of Human Rights, which states:

The will of the people shall be the basis of the authority of government; this will shall be expressed in periodic and genuine elections which shall be by universal and equal suffrage and shall be held by secret vote or by equivalent free voting procedures (UN, 2009).

The UN (2009) further deepens our understanding of the relational and not causal nature between democracy and HR:

The values of freedom, respect for human rights and the principle of holding periodic and genuine elections by universal suffrage are essential elements of democracy. In turn, democracy provides the natural environment for the protection and effective realization of human rights.

The United Nations was the first international organization that set the stage for creating a set of HR rules for the world 60 years ago, subsequently followed by other international organizations and NGOs. The end of the Cold War eased the development of an international human rights system. The global institutionalization of HR standards is the framework by which governments are judged today, and according to which social and political pressures on governments are exercised internationally, but defended nationally (LeBlanc, 1995). Hence, human rights ratification is a two-level game. The development of human rights parallels the development of democracy and transnational normative orders, led mainly by the Western states.

Human rights and democracy are also crucial aspects of the European Union's (EU) Common Foreign and Security Policy because the rule of law, liberty, and respect for human rights are considered fundamental freedoms, essential to the European integration process and prerequisites "for peace, development and security in any society" (European Commission, 2010, Article 11 of the Treaty on European Union). The EU emphasizes human rights in its foreign policy relations on three levels: in its political diplomacy with third countries, with international organizations, such as the United Nations, and through its development policy and assistance. Promoting human rights preceded the promotion of democracy and good governance in the EU, which means that these discourses are quite different, although intertwined. While human rights international and regional policies are adopted by governments of all types, we cannot say the same thing about democracy (Smith, 2008).

O'Donnell (1999) notes that one of the executive institutions in a state is the statutory and constitutional body of the state, which leads us to think that the rule of law is a crucial aspect of a democracy. Ideally, in modern democracies, constitutions (and the state observance of treaties) are associated with transparent structures of governance based on the rule of law, and are meant

to protect social justice (i.e., human rights). Some authors go further and support the idea that enforcement of HR ensures an equitable distribution of wealth, and equality and equity in respect to access to civil and political rights (UN, 2009), in a word, things that a democracy is all about. In 2002, Amartya Sen published an article in the British newspaper *The Observer* in which he connected democracy, especially its good governance aspect, with famine as the result of poverty, unequal distribution of resources and opportunities: “In democratic countries, even very poor ones, the survival of the ruling government would be threatened by famine, since elections are not easy to win after famines; nor it is easy to understand criticism of opposition parties and newspapers. That is why famine does not occur in democratic countries” (as cited in Gutierrez, 2006).

In a world characterized by cultural relativism (Ayton-Shenker, 1995), it seems that human rights are difficult to become universal and enforced similarly in all states. State compliance differs from state to state and it does not (and it should not) depend entirely on cultural values, but on the mechanisms of law enforcement. On one hand, human rights treaties and conventions are more than just universal declarations, they reflect international law enforced at a domestic level. Treaties are binding documents that depend on the degree to which the states are enforcing the law or practice good governance within their boundaries. Two fundamental rules of international law are the non-discrimination and non-favoring principles. All rights should be observed as long as one is not applied at the expense of another right. The UN Convention on the Rights of Persons with Disabilities is the first legally binding international instrument to include the full spectrum of human rights that apply to people with disabilities - civil, cultural, economic, political, and social rights (CRPD, 2006).

The international law system is limited to enforce the norms and relies on individual governments to take action towards implementation at a domestic level of the law agreed upon by ratification. That is why the rule of law has such a great importance in adopting an international treaty. In a state with a more developed law system, the international law is more likely to complement rather than contradict the domestic law, since both sets of systems are targeting the protection of people. The more experienced the country is with enforcing the law, the more likely is for that government to adopt a law that would ensure its people justice and the protection of the law. In most (with some exceptions) moderately democratic or emerging democratic countries, the specifications of such an international human rights law is more likely to be welcomed and support and complement the developing legal body (with the exception of the US and Somalia). In this sense, human rights seem to be a form of global supervision of a country's 'good governance'. However, human rights treaties address first of all domestic issues, and do not offer states natural reinforcement such as the international treaties on trade or security (Wotipka & Tsutsui, 2008). Hence, the different types of costs which need to be taken into consideration in signing a human rights treaty. The notion of the two-level game has been instructive for scholars examining the constraint of democratic institutions on state behavior. Treaties further legitimize the government or the nation-state (Hafner-Burton, Tsutsui, & Meyer, 2008) and they target a politically non-threatening segment of human capital. In addition, "the price for this commodity [ratification] is low, as enforcement is often little called into question" (Hafner-Burton et al., 2008, p.116). Locke suggested three main reasons for which the world beneficiaries from government, and Nickel (2002) believes that the same reasons apply to why people need the protection of human rights. One reason refers to acknowledged laws, without which people would remain unguided and prone to mistakes. The second refers to the need of

impartial judges, without whom biases would call for injustice. The final reason is that without the means to implement the law and enforce decisions, the injustice would be perpetuated.

Lebovic and Voeten (2006) bring evidence to the hypothesis that the worse the reputation of a state regarding HR, the greater the chances of being targeted and punished by UNCHR, and the lesser the inclination to vote against a state, especially post cold war. Thus, states that sign key HR treaties are held to a higher standard than the other states. Countries with stronger security measures are less likely to be targeted and punished by UNCHR. The closer a country is to the US (known for its relatively high democracy, but also for its strong foreign policy principles), the more likely is to be targeted and punished by UN members with dissimilar ideological alignments.

The UN (2009) identifies several obstacles to democracy, human rights, and the rule of law, including: “deepening poverty; threats to human security; the infringements of individual rights and impediments to the enjoyment of fundamental freedoms; erosions of the rule of law in contexts such as counter-terrorism; illegal occupation involving the use of force; the escalation of armed conflicts; unequal access to justice by disadvantaged groups; and impunity”. Deficits in democracy and fragile institutions are some of the principal obstacles in the implementation of human rights (UN, 2009).

In a democratic country, the rules are not only written down in the constitution, but are also implemented in the everyday life by politicians and authorities in a highly democratized state, and the possibilities of predatory political elites and all levels of corruption are decreased in a state with good governance. If a state with a higher rule of law indicator includes the legislative protection of its citizens in its constitution, I hypothesize that its population is more likely to be concerned with and be prepared to improve the conditions of people with disabilities.

Similarly, despite the competing demands related to welfare policies, I hypothesize that a highly developed country is more preoccupied with the welfare of its populace, so in a state with a high Human Development Index (HDI) value, the populace will be more preoccupied with the well-being of its fellow citizens.

In a democracy, if governments do not have the assent of the governed, then their domestic and foreign policies will not be very successful for very long. Thus, they must begin with the right values, one of which is the respect for all individuals and their rights via enforcing the rule of law. The rule of law is the ground of a democratic constitutional government, based on consent. The supremacy of the consent and welfare of the very people it governs is the basis of governments' actions and concomitantly constitute the fundament of the mixed argumentations and results of this study concerning human rights and the degree of democratization of the state. It seems that the world is desired to move towards a democratization of all countries, i.e. a cosmopolitan democracy. But how compatible are human rights and democracy in the context of globalization? Globalization has confronted leaders and policy-makers with novel issues, such as allies and adversaries in remote places - such as Afghanistan or Iraq. In a democracy, if governments do not have the consent of the governed (not of the UN or other international organizations, but of the citizens), then their domestic and foreign policies will fail. Kant correlates the norms and rules of democracies to the alteration of norms and rules in international relations (McLaughlin Mitchell, 2002), leading us to hope for a world federation of free states. I believe that promotion of democracy relies on furthering human rights, and, vice versa, the advancement of human rights throughout the world depends on establishing a democratic environment where freedom, fairness, equality and equity, grass-roots movements, transparency, pluralism, accountability, and competitiveness are reinforced.

Democracy also fosters an ambiance that ensures good governance and the enforcement of the rule of law, as a basic system that enforces justice and non-discrimination laws. These factors should bring results for marginalized groups of people, and advance humanism and humanity.

*I hypothesize that the degree of democratization of a country explains the concern that the non-disabled population has for people with disabilities, as well as the degree of preparedness they have for changing the living conditions of people with disabilities for the better.*

**Human rights and human development.** According to the Human Development Report (2010), the concept of “human development is the expansion of people’s freedoms to live long, healthy and creative lives; to advance other goals they have reason to value; and to engage actively in shaping development equitably and sustainably on a shared planet”. These principles clearly incorporate human rights aspects as discussed previously. The HDI is an aggregate that includes complex measurements of the developments in education, life expectancy, GDP per capita, gender empowerment and equity, representing a summary of “each country’s achievement in attaining: a long and healthy life; access to knowledge; and a decent standard of living” (UNDP, 2009). Human rights issues come about in some of these indices. The World Commission on Dams (2000), for example, advocates that “human rights should be the fundamental reference point in all initiatives” concerning not only developmental projects such as dams, but, in general, the entire discourse of development. As people are both the beneficiaries and the drivers of human development, planning and building, and sharing risks and benefits, pertain to both individual and collective efforts.

Within a Foucauldian framework, the “(...) ’government’ also signifies problems of self-control, guidance for the family and for children, management of the house hold, directing the

soul, etc.” (Lemke 2004). Foucault notes that the states are concerned with their population and its development, rather than territories as they were in previous centuries when the formation of nation-state took place. The collective of populace is a matter of political, economical, and biological power play (Foucault, 1976; Foucault, 1997). Seeing the body, hence population, as a bio-political reality (Foucault, 1994 a, p. vol. III), we can subject it to monitoring and surveillance, measuring and disciplining, regulation, and normalization. The state sees the law, and, as such, freedoms, as an instrument of power, rather than a tool of which the state is held responsible for. Hence, the states can create, agree with, or ratify a set of laws just as well as it can suspend them at a domestic level, and, thus, provide or take away rights and managing its population’s development.

From a Foucauldian perspective, I extend the understanding of *good governance* to the use of the term *governmentality*. The term governmentality refers to a mentality of rule that, Foucault claims, becomes the basis of the modern liberal politics (Peters, 2005). Governmentality, or the art of governance, is situated “at the intersection of two competing tendencies – state centralization and a logic of dispersion” (Peters, 2005, p. 126). The logic of dispersion refers to a specific rationality based on political economy that turns the individual into a moral agent responsible for its self-government (Peters, 2005). As such, ratification of an international convention, such as the UNCRC, is the result of the interplay between state governmentality (in Foucauldian thinking, the government and the state superimposed to identification) and populace self-governmentality. The adoption and enforcement of the law thus rests upon the socio-cultural, economic, and political negotiation of these two forces. Hence, in a democratic state, the *raison d’état* is more likely to incorporate family needs than in non-democratic states. The Foucauldian notion of self-constitution serves as a key to my

argumentation in this study and presents the basis for my consideration of the HDI statistics as measuring the magnitude of state preoccupation with its population.

In contrast to neoliberal policies, the Human Developmental Approach (HDA) focuses on people, while the economic growth remains a means to an end. While neoliberalism downsizes welfare and state interventions to a minimum, as they are seen as an investment in the human national capital, HDA is emphasizing health and education as intrinsically valuable for building democracy and society. Poverty is no longer a number below a definite income line (based on GDP) as in neoliberal policies, but it gains connotation as multiple dimensions of deprivation, from literacy, to life expectancy, and to hygiene and standards of living, and not excluding the GDP per capita indicator (UNDPa, 2009). The HDA approach emphasizes the need of educating and being educated as an expansion of human freedoms (Deneulin, 2009), and providing true choices and alternatives.

From an HDA perspective, instead of the continual militarization and masculinization of the external politics and internal political spheres, the energy should focus on how to improve long-entrenched internal problems such as discrimination and the multiple “-isms”, income disparity, and social production of good citizens. Agency is not only created, but also taught, otherwise the benefits of democracy become an abstract notion instead of a tangible privilege. Henry Giroux warns that the neoliberal way of thinking in exclusive terms of production and consumption, has become so pervasive in the Western societies that it affects the entire way of life, including institutions and education. He notes that “neoliberalism has to be understood and challenged as both an economic theory and a powerful public pedagogy and cultural politics” (p. 14). The economic liberalism, which transfers the control of the economy from public (i.e., from and for the people) to private ownership, has inundated the Western societies since around

Reagan times (1981-1989) and even put into laws that advantage the wealthy. Students have become clients and consumers of education, and teachers and children are asked to account for their teaching and learning, and not for morals, truth, and advancement of society and civilization. In a neo-liberal society, the rule of law is the one that is designed to keep the people under control, or “in order”. Neoliberal policies minimize civic engagement and the understanding of the young generation of citizenship, and decrease government intervention and services. “Citizenship has increasingly become a function of consumerism” (Giroux, 2005, p. 2). During the implementation of the neoliberal policies, the fixed and mobile capital, hence wealth, have been concentrated in the upper class, who have the largest tax cuts. However, Gutmann warns that democratic processes “can be used to undermine the intellectual foundations of future democratic deliberations by repressing unpopular ways of thinking or excluding some future citizens” from active citizenship. Thus, a democratic society “must be constrained (...) not to legislate policies that render democracy repressive or discriminatory” (2001, p. 222).

Martha Nussbaum articulates that “we can only have an adequate theory (...) of social justice more generally, if we are willing to make claims about fundamental entitlements that are to some extent independent of the preferences that people happen to have, preferences shaped, often, by unjust background conditions” (2003, p, 34) that conditionally bias their past and present. One needs to move away from economic neoliberal policies, which limit the notion of justice to GNP per capita and means of production and consumption, and adopt Sen’s capability approach, which Nussbaum deems superior to the Western social justice and the human rights approaches, if we have in mind development goals. For “women’s lives reflect a striving after many different elements of well-being, including health, education, mobility, political participation, and others” (Nussbaum, 2003, p. 34). Sen challenges the notion of equality in the

“Equality of what?” (1980) and stresses the important realization of the fact that people have dissimilar capabilities to convert resources into functionings. Using his example, a person without mobility will need more resources to become mobile, and, using Nussbaum’s example, a pregnant woman will need more nutrients than a woman who does not carry a baby.

*I hypothesize that the level of human development that a country reached explains the levels of concern for and readiness to elevate the quality of life of people with disabilities in various ways. In this sense, the higher the HDI level, the greater the concern and preparedness to better the lives of people with disabilities.*

**Democracy and human development.** Tsai found that “recent data from 1980s and 1990s showed that democracies indeed achieved higher levels on the HDI used” (2006, p. 233). These findings show the intertwining relationships between democracy and development. On the other hand, Sen (1999a, 1999b, 2000, & 2003) and UNDP (2009) acknowledge that along with freedom to make choices in life according to personal preferences, health, education, and income level that allow human development (also Vollmer & Ziegler, 2009). Based on these findings and comments, I believe *the two variables dealing with democracy and human development (WGI and, respectively, HDI) are either highly correlated with each other, and hence one of them may be redundant, or they would be more statistically powerful if grouped together in a multiple regression model.* The best model will be statistically determined by a stepwise procedure of selection and elimination of factors, which renders the highest information criterion for each of the two dependent variables (Concern and Preparedness).

## Chapter 2

### **Mixed, Quantitative, and Qualitative-Interpretive Methodologies: Research Questions, Designs, Sampling, Coding, Data Analyses, and Results**

#### **Introduction**

As shown previously, there is an entire web of social attitudes, cultural prejudices, and environmental challenges, as evidenced in laws, policies, and infrastructures, that push the people with disabilities towards the margins of society and into economic poverty. In this study, I look at different factors from this complex, interactive, and entangled fabric of socio-cultural, political, and economic loops. This study was inspired by one of my previous researches about overrepresentation of African-American and Roma minority populations in special education systems both in the United States and in Romania. The study found marginalized populations are disempowered from an early age and they remain marginalized due to a set of circumstances imposed by the society they live in, which contributed to decreased access to education and a lower living standard throughout their lives (Walker, 2008). In this chapter, I want to analyze international statistical data related to concerns towards and readiness to improve the conditions of people with disabilities (included in the quantitative analysis), as well as look at how other important factors influence and, in turn, are influenced by the agency of people with and without disabilities (included in the interpretive analysis).

#### **The Research Questions**

The overarching research questions, that this mixed study purports to answer, are as follows:

- 1) What are several factors that influence the full inclusion of people with disabilities in their communities?

In other words, what factors can explain the consideration that non-disabled populations hold of people with disabilities, and their preparedness to improve the lives of people with disabilities to become full members of their communities?

- 2) Is there a new and improved model of disabilities and special education that allows for the successful inclusion of people with disabilities in educational programs and the society?

This model will be built on the premises of respect for the right to education and job training programs, as well as the right to auto-poiesis (i.e., self fulfillment or auto-creation). I will develop this higher-order model using a set of concepts, models, and strategies for looking at a new type of inclusion.

The quantitative research questions are based on empirical data, and are mainly focused on understanding whether several country indices can explain the perception of the population with disabilities by the other members of society and their preparedness to handle and address the needs of people with disabilities:

- 1) Are there any possible linear regression models that can explain the level of mean Preparedness to work with people with disabilities (per country population) by using country development and democratization indices?
- 2) Similarly, are there any possible linear regression models that can explain the level of mean Concern for people with disabilities (per country population) by using country development and democratization indices?
- 3) Is there any relationship between the means of Preparedness or Concern (for people with disabilities, per country population) levels and education?

The interpretive research questions are focused on a broader view of societal factors that contribute to the full inclusion of people with disabilities in educational and societal settings:

- 1) In addition to the independent variables used in the quantitative analysis, what other factors contribute to understanding the possibility of full inclusion of people with disabilities in the mainstream society and economy through education and training programs?

- 2) Is there a new comprehensive framework that would contribute to the de-marginalization of people with disabilities from educational programs and mainstream society?

### **Mixing the Methods: The Mixed Methods Plan**

**Epistemological paradigms.** The paradigms used in this study are consistent with the classical approaches of mixed methodologies. That is, for the quantitative research, I will adopt a post-positivistic perspective, and for the qualitative-interpretive part of the research I will use a lens based on constructivism-interpretivism, and propose a nouvelle criticalist perspective on disabilities and special education. Because the concept of disability is so complex that it can be looked at from multiple complementary points of view, including psychology, social, political, economic, philosophical, legal, spiritual, etc., and because the education and lives of people with disabilities are influenced by numerous socio-cultural and economic-political factors, I deem appropriate to adopt different but reconcilable (complementary) paradigms.

Academic research is traditionally based on a heavy normative practice of anchoring research questions and arguments in the work of authoritative names. “However, authorities are less authoritative these days given the continuing critique of human science and long-running debates about the nature of educational research and its ‘paradigms’. These debates have both liberated research from its positivist shackles but at the same time have increased the uncertainties surrounding research practice” (McIntyre, 1988, p. 2). Hence, a discussion of disabilities and special education practices on a paradigmatic continuum is an innovative and bold attempt. Patton states that "a holistic approach assumes that the whole is greater than the sum of its parts" (p. 40). This means that the researcher’s actions and discussions must be considered in the context of the community or culture studied. I will attempt to look not only at the characteristics of the communities of people with disabilities, but more so at the entire society the people with disabilities live in. Nevertheless, a researcher needs to be aware of the

fact that this attention to detail can be overwhelming because it can bring researchers into following every lead when writing a narrative.

Post-positivism looks at the reality as the single objective truth available to us. Within this lens, it is acknowledged that the objective reality cannot be completely comprehensible, but it is attempted to be revealed in part using methods that can be controlled and that would render as unbiased results as possible (Ponterotto, 2005). Knowledge of this reality will always have some uncertainty because the world we live in is very complex and because people who look at the phenomena have their own individual lens on the social world. Post-positivism “emphasize[s] cause-effect linkages of phenomena that can be studied, identified, and generalized, and ... proffers an objective, detached researcher role” (Ponterotto, 2005, p. 129).

According to Phillips and Burbules (2000), postpositivism is

not a form of foundationalism, and so it is not a form of rationalism or of empiricism (and thus is not a form of positivism). Postpositivism is a *nonfoundationalist* approach to human knowledge that rejects the view that knowledge is erected on absolutely secure foundations – for there are no such things; postpositivists accept *fallibilism* as an unavoidable fact of life. (...)

In short, the postpositivist sees knowledge as *conjectural*. These conjectures are supported by the strongest (if possibly imperfect) warrants we can muster at the time are always subject to consideration (p. 29-30.)

Since ‘disability’ is a controversial and contextualized concept, I start my argumentation with the quantitative analyses, which rely heavily on objective regression analyses and rationalization of the connections between the dependent and independent variables. The truly objective phase of the study is the quantitative analysis itself, performed by a software program, designed to work with any variables and numbers anyone with access to it inputs. The interpretation of the results the software renders is more constructive in nature, as I try to construct the meaning based on objective facts (i.e., numbers). In the quantitative part of my study, I will employ correlation analyses between the World Governance Indicators (put together

by the World Bank), education indices (put together by investigators of the World Value Survey Network), and Human Development Indices (originated in the work of Pakistani economist Mahbub ul Haq and used extensively by the United Nations Development Programme) and two dependent variables (Preparedness to improve the conditions of and Concern for people with disabilities) put together by investigators of the World Value Survey Network. All of these variables are “man-made”, although they are constituted on the basis of rigorous performance indicators. But because these variables are constructed according to the current accessible knowledge known to experts in each of the areas, I personally see how the inherent human constructivism (i.e., generating meaning and knowledge from the interaction of humans with the world, including other human beings) and criticalism (i.e., questioning the status quo) leaves traces in the framing of these variables central to my quantitative study. In addition, although the method of running a regression analysis is run by a machine (computer) and, hence, it appears to be unbiased, I bring the argument that even the method itself was devised by the human mind with the available capabilities, so the analysis itself can only be as impartial as it was programmed to be. Over and above, I note that a regression analysis only reveals a relationship between two or more variables, and not causality. Hence, the interpretation of the results rests upon the building of the researcher’s argumentation to establish what kind of a relationship it is (e.g, logical- illogical; strong-weak).

The epistemological basis for the qualitative-interpretive component is constructivism, criticalism, and subjectivism. Crotty (1998) claims that in constructivism, human beings construct meanings as they engage with the world they are interpreting. “Therefore, all objects are made and not found and they are made by the interpretive strategies we set in motion” (Crotty, p. 47). Constructivism is the most appropriate perspective that fits my mental structure

and it defines my perception of the world. I tend to construct the meaning of the world around me as I go along interacting with and in it. I also believe that every person tends to understand the social reality from their own perspective, using their background knowledge and experience, as well as respond depending on their own conscious or unconscious biases, constructing meaning of their actions and of each other in the context of action, and how they relate to the environment around them. I will try to understand social reality by understanding and interpreting the social structures and interactions that impact the world of disabilities, including special educational policies and practices (Hutchinson, 1990). Ponterotto (2005) notes that criticalism is concerned with challenging the status quo and advocates for “emancipation and transformation, on in which the researcher’s proactive values are central to the task, purpose, and methods of the research... (and a) belief in a constructed lived experience that is mediated by power relations within social and historical contexts” (p. 129-130). The purpose of this study is to disrupt the marginalization and disempowerment of the people with disabilities and propose an improved framework for the study of disabilities and the practices of special education.

The human intervention traced in the quantitative part of this manuscript, deemed objectivist and constructivist in nature; together with the objectivist nature of the quantitative analysis; and the constructivist and subjectivist epistemological paradigms used in the interpretive part, result in a lack of dominant approach of this mixed methods study. However, I argue that covering a continuum of approaches, from objectivism, to constructivism, to subjectivism, serves my topic well, creating the opportunity for a complementary strengths paradigm stance.

**Mixed methods paradigm stance.** Because the two methodological components are looking at different levels of the same phenomena (disabilities and the education of people with

disabilities), and because they are kept separate until the moment of interpreting the results, therefore retaining their own methodological integrity, a *complementary strengths paradigm stance* will be used. Within a complementary paradigm stance, the philosophical assumptions regarding the reality and knowledge are interconnected, as I explained previously when I discussed the post-positivist and constructivist paradigms, compatible, but different in important ways (Greene, 2007). Running a statistical analysis is fundamentally different but compatible with interpreting theories that identify and describe socio-cultural and economic-political phenomena. Brewer and Hunter (1989, p. 17; as cited in Greene, 2007, p. 77) mention that the “fundamental strategy [of multimethod research] is to attack a research problem with an arsenal of methods that have nonoverlapping weaknesses in addition to their complementary strengths”, and that it is just fine to find divergent results rather than the desirable convergent outcomes. Since the data sets that serve as a ‘starting point’ in this study, as well as the methods used, or the ‘roads’ that take me to the results, are different, I expect some variation in the final results. However, the overarching theoretical drive of the whole study remains a singular one, that of looking at the phenomenon of disabilities and at the special educational policies and practices.

**Mixed methods purpose.** The purposes of this study include: (a) understanding the institutional and social phenomena of disabilities and special educational policy and practice; and (b) examining social and institutional policies and practices to shape new directions and a new, comprehensive, and practical model of improving access to education, raising the quality of education, and, ultimately, the quality of life of people with disabilities. Although “one of the most common in practice” (Greene, 2007, p. 101), mixing methods for the purposes of *complementarity* is required by the research questions of this study. “Within this purpose, a mixed methods study seeks broader, deeper, and more comprehensive social understandings by

using methods that tap into different facets or dimensions of the *same complex phenomenon*” (Greene, 2007, p. 101). The results of the quantitative and interpretive research designs elaborate, clarify, or illustrate each other. For example, the quantitative analysis may suggest new courses of action through which patterns of thought and behavior can be shaped and maintained over time (a discussion for the interpretive analysis). The quantitative part contains processes of reductive and deductive analysis (stripping away details such as reiteration, doubling, and linking concepts/variables) and generalization process (data mining), driven by external theories. The interpretive section serves the purposes to contextualize and to describe, using deductive and, especially, inductive reasoning, driven by external theories, philosophical presumptions, and personal proposals.

**Mixed methods design.** According to Greene (2007), an *integrated substance design* describes the subsequent or concurrent implementation of the methods, each given equal weight, for the purposes of complementarity or initiation. In the case of this study, it does not matter too much if the regression analyses are run before or during the time of, because the complementarity of the results will be assessed at the end of the data collection (see Fig. 1). Differing perspectives and results can only enhance the comprehensiveness of the study and rise useful ethical, legal, and policy-related discussions.

Also described in Greene (2007), there are two designs that fit the research design in the present study. I use the *component convergence design*, when my two chosen methods are implemented concurrently and with equal status, if I understand the final purpose to be triangulation, defined as measuring the same phenomena. However, if I consider that measuring different layers of the same phenomena is not quite triangulation, I consider a better fit the *integrated blending design*. In this latter design, the methods are implemented concurrently, each

given equal weight, for the purposes of complementarity or initiation (as described above), and where the comparison of the results decides whether more research is needed or not, depending on the convergence or divergence of the outcomes.

According to Teddlie and Tashakkori (2006), this study would be a *concurrent mixed design* research as I use two relatively independent methods (i.e., quantitative and qualitative-interpretive) to formulate research questions, collect data, and analyze the data. At the end, I develop meta-inferences based on the results from each strand.

Cresswell, Clark, Gutmann, and Hanson (2003) describe a *concurrent transformative type* of mixed methods design, which fits my intentions for the research design of this study the best. The collection of the quantitative and qualitative data is concurrent, and the two methods can be equal in weight or either one can be dominant. The integration of the mixed methods occurs at the analysis and interpretation phases of the study. The theoretical perspective I described in the literature review section finds its place in the interpretation of results section, where I advocate for increased access to education for people with disabilities, empowerment of all people with disabilities through quality education and employment opportunities, and an ecological change in the patterns of thought and behavior of people without disabilities. This advocacy perspective will nuance my mixed methods design with a transformative framework.

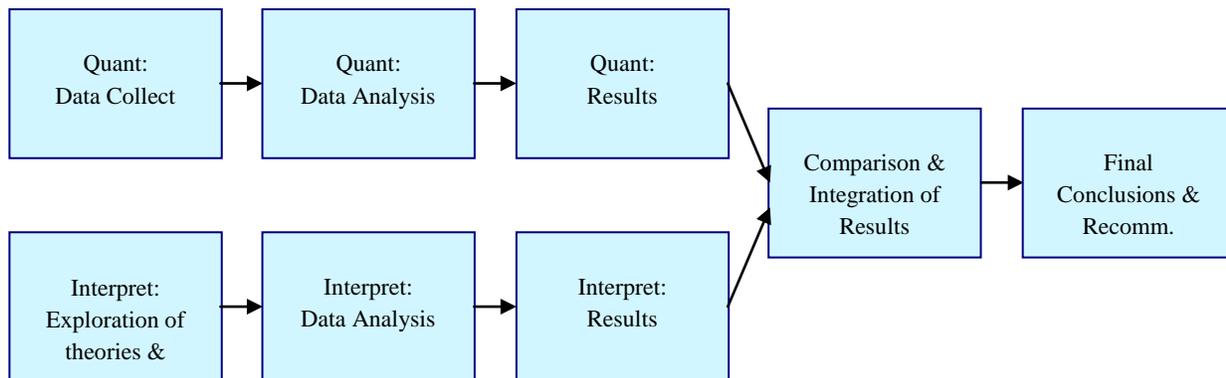


Figure 1. Mixed methods design.

**Mixed Methods Data Analyses.** In the quantitative part of the study, I perform data cleaning, rescaling, and transformation by selecting distinct data indicators to perform the regression analyses, in correspondence to available data. In the qualitative-interpretive section, (1) I interpret texts, events, human actions, concepts and narratives, (2) I analyze United Nations, European Union, and United States conventions, legislation, and administrative policies, and (3) I pay attention to the interpretation of culture, practices, and artifacts, including analysis of language, in understanding the patterns of inclusion, exclusion, and the dynamics of power that influence the education and the lives of people with disabilities. At the mixed methods level, I use data correlation and comparison by investigating patterns in the quantitative method results and try to identify similar patterns in the interpretive results. At the end, I draw common conclusions for both sets of data and analyses, on which I will base my recommendations for the fields of special education and disability studies. This higher-order or major analysis is possible across data sets of different forms (Greene, 2007).

## **Single Methods: Design, Sampling, Coding, and Measures**

### **Quantitative Method**

The role of the quantitative methodology is to assess numerically, at a large scale, the relationship between attitudes of the general population from various countries towards people with disabilities with indicators of human rights for people with disabilities. The scarcity of global data on disabilities, as indicated in the previous chapter, is constraining. The only data publicly available about the attitudes towards people with disabilities comes from World Values Survey Network (2009), as described below in the sampling and coding procedures, and it is limited to countries which are part of the Council of Europe, which is an international organization that “seeks to develop throughout Europe common and democratic principles based on the European Convention on Human Rights and other reference texts on the protection of individuals” (Council of Europe, 2011). Recognizing the limitation of generalizability of the results due to this methodological constraint, I take the data as being representative of Western attitudes towards disabilities. Detailed discussions about these issues are found in this quantitative methodology section. Henkin et al.(2009) notes that quantitative analyses on the causes of repression are relatively a new idea to research. Hence, this study intends to add to the body of research on limitations of freedoms of people with disabilities. Only by understanding the relationships between country variables (such as socio-cultural and developmental) and repression of people with disabilities researchers and interested parties can reach beyond individual organizational or country cases, make the transition from a human rights paradigm to a more comprehensive ecological and interactionist model, and alter variables that can bring about positive change in the prevention, treatment, and delivery of services for people with disabilities.

**Hypotheses.** The testable hypotheses in the quantitative methodology are formulated as follows:

- 1) H1: The level of mean preparedness to work with people with disabilities (per country population) can be explained by the country development and democratization variables by using linear regression.
- 2) H2: The level of mean concern for people with disabilities (per country population) can be explained by the country development and democratization variables by using linear regression.
- 3) H3: The level of education can explain the mean levels of preparedness to improve the lives of and concern for people with disabilities.

**Sample and coding.** The two *dependent variables* are the Concern for and Preparedness to improve the conditions of people with illnesses and disabilities, and they are imported from the World Values Survey Network (2009). The variable named “Concerned with sick and disabled people”, coded E 162, and defined as “to what extent [people] feel concerned about the living conditions of: Sick and disabled people in your country”, is referred to as “Concern” for short in this study. The variable “Prepared to help sick and disabled people”, coded E167, and defined as people being “prepared to actually do something to improve the conditions of: Sick and disabled people in your country”, is referred to “Preparedness” for short in this study. Both sets of data were collected in the year of 1999/2000, and the mean level is used for both these variables.

As *independent variables*, I use the Worldwide Governance Indicators (WGI), regarding the degree of national democratization, the Human Development Index (HDI) that ranks countries by their level of ‘human development’, and the national level of education.

**WGI.** Although there are several indices that measure the degree of democratization of a country (such as the CIRI Human Rights Index or the Polity net-democracy score), I choose the ones put together by the World Bank, called the Worldwide Governance Indicators (WGI)

(Kaufmann, Kraay, & Mastruzzi, 2008). The degree of democracy is expressed in six governance and democratic indicators (WGI), most recently reported in 2008:

The governance indicators presented here reflect the statistical compilation of responses on the quality of governance given by a large number of enterprise, citizen and expert survey respondents in industrial and developing countries, as reported by a number of survey institutes, think tanks, non-governmental organizations, and international organizations. [...] This release of the data supersedes previous releases (Kaufmann, Kraay & Mastruzzi, 2008).

The particular column I use in my analysis represents percentage rank (i.e., values from 0 to 100), where higher values correspond to better governance outcomes. Hence, I use the following WGI coded variables:

- I1: Voice and Accountability,
- I2: Political Stability and Absence of Violence,
- I3: Government Effectiveness,
- I4: Regulatory Quality,
- I5: Rule of Law, and
- I6: Control of Corruption.

These indicators pertain to several aspects of democracy, which, although highly associated among them because they are measuring the same main idea (of democracy), may not have the same impact on the perception of disabilities and the preparedness to work with people with disabilities. *Voice and accountability* measures the extent to which people are allowed to participate in elections and express their will, to associate with one another, and to have access to veridic information (free media). *Political stability and absence of violence* measures perceptions of whether the government is at risk of being overthrown and destabilized through unconstitutional or violent acts. *Government effectiveness* refers to the extent of the quality of public and civil services and its dependence on political obligations, the quality of the policy development and enforcement, and the credibility of state's loyalty to implement such policies. *Regulatory quality* measures perceptions of government ability to develop and implement policies that promote the private sector. *Rule of law* measures perceptions of the confidence

people have that the government enforces rules in society, especially the contract sanctity, title rights, police and the courts, and the probability of crime and violence. *Control of corruption* refers to the magnitude to which public power is used for private gain, from small to important forms of corruption, as well as the monopoly of elites on state and private interests.

Of all the indicators listed above, I recognize the importance of several distinct factors, as well as the possibility of clustering together some of the indicators that pertain to similar issues. Freedom of opinion and speech is one characteristic of modern democracy (Democracy Building, 2004) and pertains to free media, and, among the six described indices, it stands by itself. Another characteristic of modern democracy is good governance, which focuses on public interest, policy making and implementation, and the absence of corruption (Democracy Building, 2004). Under *good governance* we can thus aggregate several indicators under discussion herein: namely, government effectiveness (I3), regulatory quality (I4), and rule of law (I5), as they pertain to the extent to which policies are developed and enforced in the public, civil, and private system for the benefit of the people. The Political Stability and Absence of Violence indicator is partly similar to the Control of Corruption indicator (I6), and thus, I anticipate they can be clustered together. However, a linear regression analysis can be applied to quantify the strength of the relationship between each dependent variable and a set of independent variables. This way, I can obtain information about which independent variable has or has not a relationship with the dependent variable and what is the best subset of explanatory variables with which the other independent variables are no longer informative. I use an average of the estimate values for the years 1995-2005 for each country.

***HDI.*** HDI is a single aggregate statistic that combines three dimensions: life expectancy at birth, mean years of schooling and expected years of schooling, and Gross National Income

(GNI) per capita. The scores for these three dimensions are then aggregated into a composite index using geometric mean. This composite statistic can be used as a tool for participatory development by holding governance representatives accountable and by encouraging advocacy groups to become more active. The UNDP acknowledge that the use of HDI for short-term developmental issues can be difficult, because two of its components (life expectancy and adult literacy) change slowly. However, for this study this represents a factor of stability. The UNDP encourages the use of HDI in conjunction or combination with other indices to increase sensitivity to high profile and sensitive issues.

***Education.*** The education data is imported from the World Values Survey Network (2009), coded X025R, and represents a three level (lower, middle, and upper) index of highest educational level obtained on a country basis. The independent variable Education is expressed on a scale (-3, 3), according to the coding of the source of the data. Dependent variables are transformed to scale from 0 to 4. I include all the independent countries by the year of 1999, which data was available for at the level of all the targeted variables, remaining a total number of N=30 for the Preparedness variable and N= 31 for the Concern variable. This selection has resulted in data analysis mostly for European countries (see Tables 2.1 and 2.2). Usually, the statistical reports are aggregated several years after the year they are collected in, hence, I consider these data not being obsolete and worthy of analysis.

**Data collection and measures.** Explanations on what the data measure and how it is measured are explained on each website that the data was imported from. The independent variables are taken as they are posted online. The WGI are collected and calculated by the World Bank and the methodology for gathering data, aggregating, and analyzing it is published online as open source (see Kaufmann, Kraay, Mastruzzi, 2008). The HDI serves “as a frame of

reference for both social and economic development” (HDI, 2010) and facilitates comparisons within and among different countries. I transformed the Education independent variable and the two dependent variables to a more convenient scale, as described below, but using the online data as the basis of that calculation. These three variables are aggregated by the researchers affiliated with the World Values Survey Network (2009), and their detailed random sampling procedure is based on questionnaires and interviews and it is described in multiple files (per each country and data collection wave) and uploaded as open source in the section on “Documentation of the Values Surveys”.

**Data analysis and results.** This section explores the relationship between the independent variables described above (WGI, HDI, and Education level) and examines potential models that show how these variables can explain the dependent variables (Concern and Preparedness). I begin by using correlations to examine how the predictors and dependent variables are related to each other. I then use multiple logistic regression analysis to “model simultaneously the effects of multiple independent variables on a dependent variable” (Orme & Buehler, 2001, p. 49). The statistical significance (critical  $p$ -value) of the modeled relationship is assessed to determine if the strength of the relationship might have occurred by chance by checking the F-test of the overall model and t-tests of individual regression coefficients. It is also important to assess the goodness of model fit by recording R-squared. As a final objective, I conduct the data analysis to find out the association between the Concern for and Preparedness to work with people with disabilities (dependent variables), in relation to the degree of democracy, human development, and education levels (independent variables) in 31 (i.e., N=31 for Concern), and respectively, 30 (i.e, N=30 for Preparedness) European countries. Data analysis was conducted using R software, but it can be replicated in any other statistical software.

*Preparedness.* Due to the ordinal nature of the levels the data, I assigned values to each level of the Preparedness and Concern variables creating numerical variables that represent level of Preparedness and Concern for each country. Specifically, I assigned scores from 0 to 4 using the principle “the more the better” (“very much Prepared” assume higher Preparedness level then “much Prepared”, etc.). I wanted to record it so the country with the larger amount of prepared people receives a larger score. I did this by taking the proportion of people in a country that responded to each category of Preparedness (or Concern) and I multiplied that value by the value of that category. I then summed up all the products for each category to arrive at a final score for each country. For example, for Austria, I multiplied the percentage of people who are in a certain group with the score assigned to this group, then summed up all the products to arrive to the final score, which I call “mean Preparedness score”, because it describes an average level of Preparedness in the country (see Table 3). This calculation is typical for social and public choice literature to aggregate data. The education mean level was constructed in the same way as the Preparedness and Concern mean levels. The Education mean level data indicate in which group, for example "high education" or “low education" most people in the country are situated. For example, the formula for find the average value for Preparedness is shown in Table 3.

Table 1

Informational summary for the dependent variable Concern

Obs	Country	Mean Concern	HDI	Pol.						Mean Ed.	Max Ed.	Ed. Low	Ed. Middle	Ed. Upper
				Voice & Account.	Stab. & Absence Viol.	Gvt. Effectiv.	Regul. Quality	Rule of Law	Control Corrup.					
1	AUSTRI	2.47	0.94	1.37	1.30	1.91	1.52	1.85	1.89	2.36	3.00	0.49	0.38	0.10
2	BELARU	1.97	0.79	-1.20	-0.08	-0.78	-1.90	-1.02	-0.73	2.12	2.00	0.27	0.58	0.20
3	BELGIU	2.48	0.94	1.38	1.09	1.82	1.21	1.37	1.50	1.92	2.00	0.23	0.46	0.30
4	BULGAR	2.71	0.81	0.48	0.44	0.041	0.29	-0.13	-0.15	2.17	2.00	0.36	0.45	0.20
5	CROATI	2.87	0.84	0.21	0.17	0.24	0.11	-0.03	0.02	2.25	2.00	0.38	0.49	0.10
6	CZECHR	2.71	0.87	0.89	0.81	0.81	0.92	0.77	0.39	2.39	3.00	0.51	0.38	0.10
7	DENMA R	2.43	0.93	1.53	1.27	2.02	1.67	1.83	2.17	2.26	3.00	0.56	0.15	0.30
8	ESTONI	2.30	0.83	1.004	0.72	0.79	1.31	0.61	0.61	2.13	2.00	0.31	0.51	0.20
9	FINLAN	2.54	0.94	1.57	1.47	2.03	1.82	1.91	2.34	2.44	3.00	0.57	0.30	0.10
10	FRANCE	2.64	0.94	1.12	0.91	1.52	0.98	1.35	1.40	2.36	3.00	0.58	0.20	0.20

(continued)

Table 1 (continued)

Obs	Country	Mean Concer n	HDI	Pol.						Mean Ed.	Max Ed.	Ed. Low	Ed. Middle	Ed. Upper
				Voice & Account.	Stab. & Absence Viol.	Gvt. Effectiv.	Regul. Quality	Rule of Law	Control Corrup.					
11	GERMA N	2.56	0.93	1.38	1.20	1.86	1.48	1.67	2.007	2.32	2.00	0.42	0.48	0.10
12	GREECE	2.92	0.90	1.02	0.54	0.83	0.86	0.78	0.62	1.59	1.00	0.09	0.41	0.50
13	HUNGAR	2.28	0.85	1.14	0.91	0.96	1.07	0.85	0.71	2.54	3.00	0.65	0.24	0.10
14	ICELAN	2.71	0.94	1.50	1.41	2.05	1.41	1.91	2.15	2.24	3.00	0.42	0.39	0.20
15	IRELAN	3.22	0.93	1.33	1.30	1.72	1.70	1.62	1.55	2.35	3.00	0.53	0.28	0.20
16	ITALY	2.90	0.93	1.01	0.75	0.92	0.90	0.84	0.72	2.29	3.00	0.44	0.41	0.20
17	LATVIA	2.005	0.81	0.79	0.41	0.55	0.83	0.26	0.12	2.04	2.00	0.23	0.59	0.20
18	LITHUA	2.67	0.83	0.89	0.53	0.51	0.86	0.37	0.33	2.14	2.00	0.26	0.61	0.10
19	LUXEMB	2.09	0.96	1.43	1.55	2.10	1.82	1.89	2.07	2.15	2.00	0.34	0.47	0.20
20	MALTA	3.04	0.88	1.27	1.42	1.06	1.05	1.33	0.72	2.17	2.00	0.28	0.61	0.10
21	NETHER	2.42	0.95	1.56	1.40	2.10	1.91	1.76	2.19	1.98	2.00	0.31	0.36	0.30
22	POLAND	2.66	0.85	1.05	0.56	0.62	0.67	0.67	0.53	2.43	3.00	0.56	0.31	0.10

(continued)

Table 1 (continued)

<b>Obs</b>	<b>Country</b>	<b>Mean Concer n</b>	<b>HDI</b>	<b>Voice &amp; Account</b>	<b>Pol. Stab. &amp; Absenc e Viol.</b>	<b>Gvt. Effectiv</b>	<b>Regul. Quality</b>	<b>Rule of Law</b>	<b>Control Corrup.</b>	<b>Mean Ed.</b>	<b>Max Ed.</b>	<b>Ed. Low</b>	<b>Ed. Middl e</b>	<b>Ed. Uppe r</b>
23	PORTUG	3.07	0.89	1.36	1.28	1.25	1.15	1.22	1.27	2.59	3.00	0.67	0.25	0.10
24	ROMANI	2.53	0.80	0.41	0.17	-0.25	0.04	-0.20	-0.34	2.18	2.00	0.36	0.46	0.20
25	RUSSIA	2.78	0.79	-0.47	-0.71	-0.44	-0.58	-0.93	-0.917	1.89	2.00	0.12	0.66	0.20
26	SLOVAK	2.77	0.85	0.83	0.71	0.42	0.61	0.28	0.14	2.22	2.00	0.31	0.60	0.10
27	SLOVEN	2.56	0.89	1.12	1.05	0.87	0.88	1.03	0.91	2.13	2.00	0.28	0.57	0.20
28	SPAIN	2.44	0.93	1.27	0.64	1.76	1.30	1.31	1.39	2.36	3.00	0.51	0.34	0.20
29	SWEDEN	2.73	0.95	1.57	1.35	2.05	1.45	1.81	2.23	1.92	2.00	0.23	0.47	0.30
30	TURKEY	3.36	0.76	-0.48	-0.97	-0.05	0.25	-0.09	-0.31	2.52	3.00	0.61	0.30	0.10
31	UKRAIN	2.80	0.77	-0.49	-0.26	-0.69	-0.69	-0.931	-1.04	1.89	2.00	0.14	0.61	0.30

*Note:* HDI = Human Development Index; Voice & Account. = Voice and Accountability; Pol. Stab. & Absence Viol. = Political Stability and Absence Violence; Gvt. Effectiv. = Government. Effectiveness; Regul. Quality = Regulatory Quality; Control Corrup. = Control of Corruption; Mean Educ. = Average Education Level; Max. Educ. = Maximum Level of Education.

Table 2

Informational summary for the dependent variable 'Preparedness'

Obs.	Country	Mean Prep.	Avg. HDI	Pol.		Gvt. Effectiv.	Regul. Quality	Rule of Law	Control Corrup.	Mean Ed.	Max Ed.	Ed. Low	Ed. Middle	Ed. Upper
				Voice & Account.	Stab. & Absence Viol.									
1	AUSTRI	2.63	0.94	1.37	1.29	1.91	1.52	1.85	1.90	2.36	3.00	0.49	0.38	0.13
2	BELARU	1.07	0.79	-1.207	-0.08	-0.78	-1.89	-1.02	-0.73	2.12	2.00	0.27	0.58	0.15
3	BELGIU	2.83	0.94	1.38	1.09	1.82	1.21	1.37	1.50	1.92	2.00	0.23	0.46	0.31
4	BULGAR	2.78	0.82	0.48	0.44	0.04	0.29	-0.13	-0.15	2.17	2.00	0.36	0.45	0.19
5	CROATI	2.97	0.84	0.21	0.17	0.24	0.11	-0.03	0.02	2.25	2.00	0.38	0.49	0.13
6	CZECHR	2.92	0.87	0.90	0.80	0.81	0.921	0.77	0.40	2.39	3.00	0.51	0.38	0.10
7	DENMAR	2.81	0.93	1.53	1.27	2.02	1.671	1.83	2.17	2.26	3.00	0.56	0.15	0.28
8	ESTONI	2.32	0.83	1.003	0.71	0.79	1.31	0.61	0.61	2.13	2.00	0.31	0.51	0.18
9	FINLAN	2.84	0.94	1.57	1.47	2.03	1.82	1.91	2.34	2.44	3.00	0.57	0.30	0.13
10	FRANCE	2.73	0.94	1.11	0.91	1.52	0.98	1.35	1.40	2.36	3.00	0.58	0.20	0.22
11	GERMAN	2.55	0.93	1.38	1.20	1.86	1.48	1.67	2.01	2.32	2.00	0.42	0.48	0.10
12	GREECE	2.88	0.90	1.02	0.54	0.82	0.86	0.79	0.62	1.59	1.00	0.09	0.41	0.50

(continued)

Table 2 (continued)

Obs.	Country	Mean Prep.	Avg. HDI	Pol.					Rule of Law	Control Corrup.	Mean Ed.	Max Ed.	Ed. Low	Ed. Middle	Ed. Upper
				Voice & Account.	Stab. & Absence Viol.	Gvt. Effectiv.	Regul. Quality								
13	HUNGAR	2.57	0.85	1.14	0.91	0.96	1.07	0.85	0.71	2.54	3.00	0.65	0.24	0.11	
14	ICELAN	3.00	0.94	1.50	1.41	2.05	1.40	1.91	2.15	2.24	3.00	0.42	0.39	0.20	
15	IRELAN	3.12	0.93	1.33	1.30	1.72	1.70	1.62	1.55	2.35	3.00	0.53	0.28	0.20	
16	ITALY	2.99	0.93	1.01	0.75	0.92	0.90	0.84	0.72	2.29	3.00	0.44	0.41	0.15	
17	LATVIA	2.56	0.81	0.79	0.41	0.55	0.83	0.26	0.12	2.04	2.00	0.23	0.59	0.17	
18	LITHUA	2.05	0.83	0.89	0.53	0.51	0.86	0.37	0.33	2.14	2.00	0.26	0.61	0.14	
19	LUXEMB	2.73	0.96	1.43	1.55	2.10	1.82	1.89	2.07	2.15	2.00	0.34	0.47	0.19	
20	MALTA	3.05	0.88	1.27	1.42	1.06	1.05	1.33	0.73	2.17	2.00	0.28	0.61	0.11	
21	NETHER	2.71	0.95	1.56	1.40	2.10	1.91	1.76	2.19	1.98	2.00	0.31	0.36	0.33	
22	POLAND	2.89	0.85	1.05	0.56	0.62	0.67	0.67	0.53	2.43	3.00	0.56	0.31	0.13	
23	PORTUG	2.88	0.89	1.36	1.28	1.25	1.15	1.23	1.27	2.59	3.00	0.67	0.25	0.08	
24	ROMANI	2.83	0.80	0.41	0.17	-0.25	0.04	-0.20	-0.33	2.18	2.00	0.36	0.46	0.18	
25	RUSSIA	2.23	0.79	-0.471	-0.71	-0.44	-0.58	-0.93	-0.91	1.89	2.00	0.12	0.66	0.21	

(continued)

Table 2 (continued)

Obs.	Country	Mean Prep.	Avg. HDI	Pol.					Rule of Law	Control Corrup.	Mean Ed.	Max Ed.	Ed. Low	Ed. Middle	Ed. Upper
				Voice & Account.	Stab. & Absence Viol.	Gvt. Effectiv.	Regul. Quality								
26	SLOVAK	2.90	0.85	0.83	0.71	0.42	0.61	0.28	0.14	2.22	2.00	0.31	0.60	0.09	
27	SLOVEN	2.85	0.90	1.12	1.05	0.87	0.88	1.03	0.91	2.13	2.00	0.28	0.57	0.15	
28	SPAIN	2.62	0.93	1.27	0.64	1.76	1.30	1.31	1.39	2.36	3.00	0.51	0.34	0.15	
29	SWEDEN	3.15	0.95	1.57	1.35	2.05	1.45	1.81	2.23	1.92	2.00	0.23	0.47	0.29	
30	UKRAIN	2.03	0.77	-0.50	-0.26	-0.69	-0.70	-0.93	-1.04	1.89	2.00	0.14	0.61	0.25	

*Note:* HDI = Human Development Index; Voice & Account. = Voice and Accountability; Pol. Stab. & Absence Viol. = Political Stability and Absence Violence; Gvt. Effectiv. = Government. Effectiveness; Regul. Quality = Regulatory Quality; Control Corrup. = Control of Corruption; Mean Educ. = Average Education Level; Max. Educ. = Maximum Level of Education.

Table 3

Mean Preparedness Score Data Transformation

Country	Very Much Prep	Much Prep	Moderate Prep	Not Much Prep	Not at all Prep	Mean Preparedness
Score	4	3	2	1	0	
AUSTRI	0.13	0.44	0.37	0.05	0.01	$2.6300 = 0.12*4 + 0.44*3 + 0.37*2 + 0.05*1 + 0.01*0$
BELARU	0.02	0.08	0.16	0.43	0.31	$1.0700 = 0.02*4 + 0.08*3 + \dots$
BELGIU	0.22	0.46	0.27	0.03	0.01	2.8300

Table 4 shows correlations between variables that reveal some redundancy in explanatory data and not all variables are necessary in the analysis. The pairwise correlation coefficients for Voice and Accountability, Political Stability and Absence of Violence, Government Effectiveness, Regulatory Quality and Rule of Law exceed 0.90. Such high correlation supports our intuition about the nature of the coefficients. I expected not to have all coefficients in the regression model present, in order to avoid a multicollinearity problem. The correlation index for HDI does not exceed 0.70.

Table 4  
Correlation Coefficients for Mean Preparedness

	Prepared.	HDI	Voice & Account.	Pol. Stab. & Absence Viol.	Gvt. Effectiv.	Regul. Quality	Rule of Law	Control of Corruption
Prep.	-	0.56	0.72	0.56	0.54	0.66	0.60	0.50
HDI	0.56*	-	0.83	0.84	0.95	0.81	0.93	0.94
Voice & Account.	0.72*	0.83	-	0.90	0.91	0.97	0.94	0.88
Pol. Stab. & Absence Viol.	0.56	0.84	0.90	-	0.90	0.867852	0.95	0.91
Gvt. Effectiv.	0.54	0.95	0.90	0.90	-	0.92	0.99	0.99
Regul. Quality	0.66	0.81	0.97	0.87	0.92	-	0.93	0.88
Rule of Law	0.60	0.93	0.94	0.955	0.99	0.93	-	0.97
Control of Corruption (negative)	0.50*	0.94	0.88	0.91	0.98	0.88	0.97	-

Note: HDI = Human Development Index; Voice & Account. = Voice and Accountability; Pol. Stab. & Absence Viol. = Political Stability and Absence Violence; Gvt. Effectiv. = Government. Effectiveness; Regul. Quality = Regulatory Quality; Control Corrup. = Control of Corruption; Mean Educ. = Average Education Level; Max. Educ. = Maximum Level of Education.

**Stepwise Procedure.** For the explanatory variable selection in the logistic model we use a *stepwise* procedure. The stepwise procedure identifies the best model in a situation with multiple regressors, i.e. the best model with significant explanatory variables and high explanatory power (R squared). The correlation matrix suggests that not all six WGI indices are equally useful and

some of them are highly correlated with others. The stepwise procedure combines the *forward selection* and the *backward elimination* techniques. On each step, the procedures consider whether any variable currently included in the model contributes significantly to explaining the outcome variable determined by the change in F-test for the model. Based on the change, I remove the variables that are not contributing. The combination of forward selection and backward elimination permits me to explore whether any variable that is not yet selected can make significant contribution to the analysis after choosing to add or remove other variables. The procedure stops when no more additions or eliminations can be made and the model has the highest information criterion. The final and best model includes three explanatory variables: HDI, Voice and Accountability, and Control of Corruption.

The final model for logistic regression is as follows:

$$\text{Mean Preparedness level} = \beta_0 + \beta_1 \text{HDI} + \beta_2 I_1 + \beta_3 I_6$$

The estimated coefficients are presented in Table 5, where you can see that all explanatory variables are significant which means they all have significant (not equal to zero) impact on the preparedness level. Index HDI has a positive effect on Preparedness (when HDI changes on one unit preparedness increases on 5.2 units); Voice and Accountability also has positive effect on the level of the preparedness, although it is smaller; and, interestingly, Control of Corruption has small but significant *negative* effect on mean preparedness. The sign of the coefficient indicates whether the probabilities increase or decrease with the increase of the corresponding factor.

Table 5

Estimated coefficients for the stepwise procedure for Preparedness:

	Estimate	Effect	Std. Error	t value	Pr(> t )
(Intercept)	-2.13		1.88	-1.14	0.27
HDI	5.18	Strong Positive	2.26	2.30*	0.03
Voice and Accountability	0.77	Small Positive	0.15	5.24***	1.81e-05
Control of Corruption	-0.54	Small negative	0.16	-3.38**	0.002

Note: Multiple R-squared: 0.67; Adjusted R-squared: 0.63; Stars correspond to the level of statistical significance (\*p < .01; \*\* p < .001; \*\*\* p < .0001).

Overall, the model is pretty good with the Adjusted R-squared being equal to 0.63, which means that we can explain more than 0.60 of the deviation in preparedness level by using our three explanatory variables. In social science, this is a reasonable level of significance.

Interestingly, the correlation between Education and Preparedness was very small,  $r=0.191$ . Similarly, the correlation between education and preparedness for the majority of people was only 0.24, less than moderate, or at least I could not find data transformation which disentangles the impact of education:

Correlation index between Preparedness and mean Education level = 0.19

Correlation index between Preparedness and Education level of the majority of the people = 0.24

The Education level of the majority of the people refers to the level of education of the largest group (i.e., that comprises the largest percentage of the population) and it receives the corresponding score.

**Comparison Case for Preparedness.** To provide an example, the best comparison for the Preparedness data would be between Sweden and Belarus, as they have the highest (3.15) and, respectively, the lowest (1.07), Mean Preparedness Scores. Table 6 reveals the distribution of Preparedness data across its 5 levels and the country values for the significant independent variables that were selected in the Final Model for Preparedness, also illustrated in Figure 2,

which displays the data for Sweden and Belarus across the 5 levels of Preparedness, with the two country distributions being skewed in opposite direction, from ‘Very Much Prepared’ to ‘Not at All Prepared’.

Table 6

Data Comparison for Countries with Highest (Sweden) and Lowest (Belarus) Mean Preparedness Score

Country/Indices	V Much Prep	Much Prep	Preparedness	N Much Prep	N at All Prep
Sweden	0.28	0.6	0.11	0.01	0
Belarus	0.17	0.49	0.28	0.07	0.01

Country/Indices	HDI	I1	I6
Sweden	0.9510	1.5713	2.2286
Belarus	0.7860	-1.2018	-0.7266

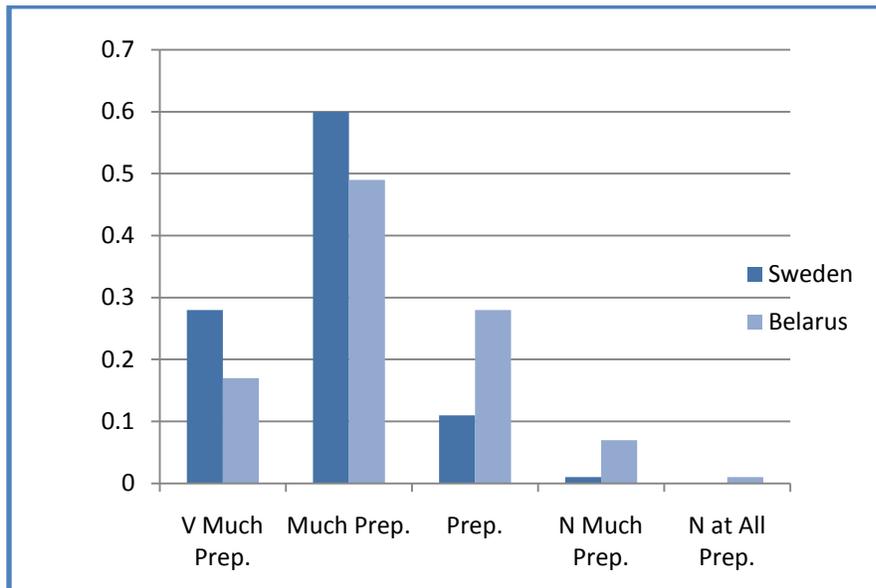


Figure 2. Direct Comparison between the 5 Levels of Preparedness for Sweden and Belarus

Figures 3 and 4 show the data of the independent variables that were selected through the Stepwise Procedure in the Final Preparedness Model, as together being the most significant mélange of variables among the ones tested herein. The difference between the HDI values for

Sweden (HDI=.95) and Belarus (HDI=.79) are high enough for the variable to end up in the final model. The difference in values for Voice and Accountability (I1) and Control of Corruption (I6) are the most striking (see Figures 3 and 4). For Belarus, the negative values (I1= -1.2 and I6= -.73) indicate a poor situation for freedom of expression, accountability, and corruption, while in Sweden these indices have a high positive level (I1=1.57 and I6=2.23).

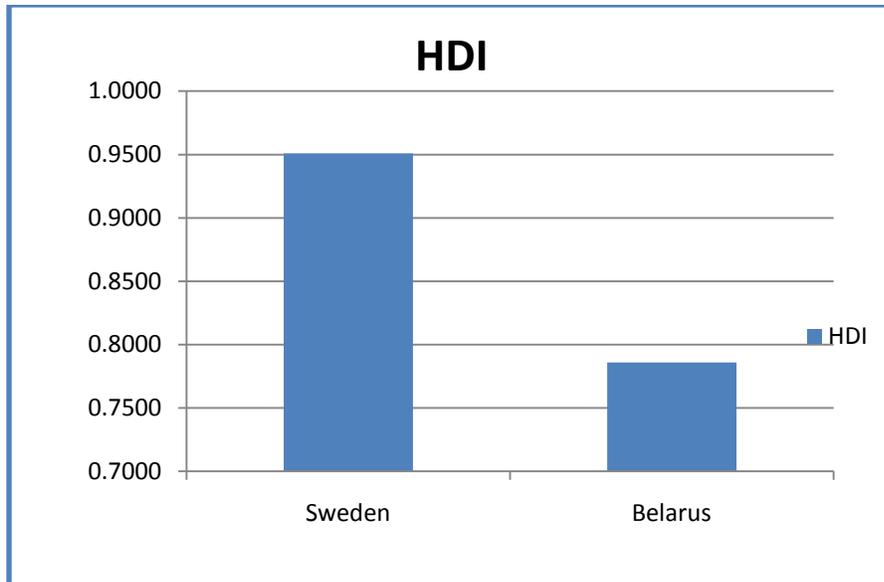


Figure 3. Direct Comparison between the HDI Level for Sweden and Belarus for Preparedness

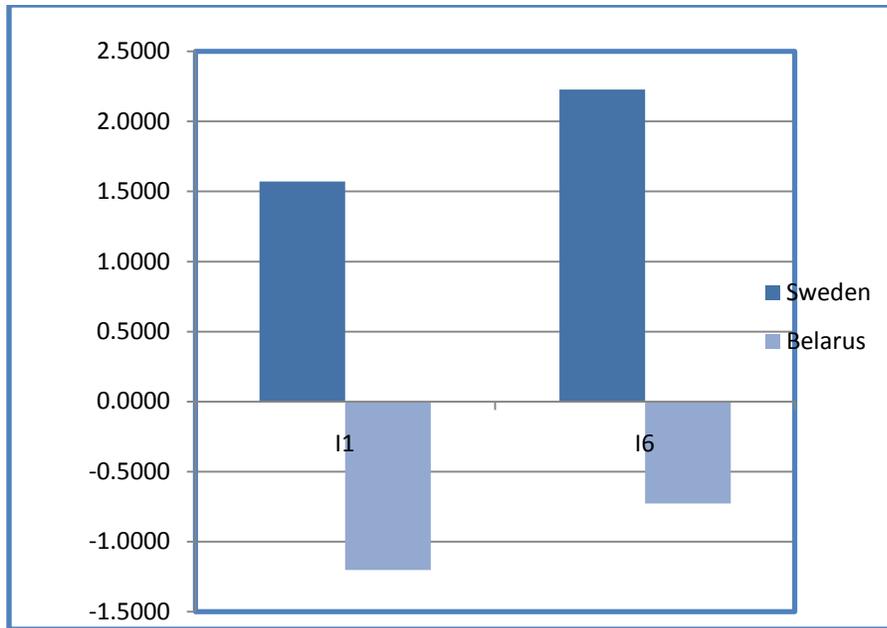


Figure 4. Direct Comparison between the Significant WGI Indices for Sweden and Belarus (Voice and Accountability – I1 and Control of Corruption – I6)

**Concern.** For the Concern dependent variable, I applied the same data transformation that I used for the Preparedness variable. However, the correlations for mean Concern level and other variables are pretty low, as seen in Table 7.

Table 7

Correlation Coefficients for Mean Concern

	Concern	HDI	Voice & Account.	Pol. Stab. & Absence Viol.	Gvt. Effectiv.	Regul. Quality	Rule of Law	Control Corrup.	Mean Educ.	Max. Educ.
Concern	-	-0.06	-0.05	-0.17	-0.10	0.01	-0.04	-0.13	0.15	0.17
HDI	-0.06	-	0.85	0.86	0.94	0.80	0.93	0.93	0.07	0.26
Voice & Account	-0.05	0.85	-	0.90	0.90	0.95	0.93	0.88	0.17	0.24
Pol. Stab. & Absence Viol.	-0.17	0.86	0.90	-	0.87	0.81	0.90	0.88	0.16	0.19
Gvt. Effectiv.	-0.10	0.94	0.90	0.87	-	0.92	0.98	0.98	0.18	0.33

(continued)

Table 7 (continued)

Regul. Quality	0.01	0.80	0.95	0.81	0.92	-	0.93	0.88	0.22	0.29
Rule of Law	-0.04	0.93	0.93	0.90	0.98	0.93	-	0.98	0.24	0.35
Control Corrup.	-0.13	0.93	0.88	0.88	0.98	0.88	0.98	-	0.19	0.32
Mean Educ.	0.15	0.07	0.17	0.16	0.18	0.22	0.24	0.19	-	0.83
Max. Educ.	0.17	0.26	0.24	0.19	0.33	0.29	0.35	0.32	0.83	-

Note: HDI = Human Development Index; Voice & Account. = Voice and Accountability; Pol. Stab. & Absence Viol. = Political Stability and Absence Violence; Gvt. Effectiv. = Government Effectiveness; Regul. Quality = Regulatory Quality; Control Corrup. = Control of Corruption; Mean Educ. = Average Education Level; Max. Educ. = Maximum Level of Education.

The best possible model for the mean Concern level, suggested by step-wise regression procedure, includes the following variables: HDI, Political Stability and Absence of Violence, Government Effectiveness, Regulatory Quality, and Rule of Law. Final Model is as follows:

$$\text{Mean Concern level} = \beta_0 + \beta_1 \text{HDI} + \beta_3 I_2 + \beta_4 I_3 + \beta_5 I_4 + \beta_6 I_5$$

The effects on concern level are presented in the Table 8. The variables HDI, Regulatory Quality, and Rule of Law have positive effects (higher value of indicators show higher level of concern) and the Political Stability and Absence of Violence and Government Effectiveness have a negative effect, especially the Government Effectiveness variable. All variables are significant, except Regulatory Quality (but it can still be kept in the model) and Adjusted R-squared does not have a high value (Adj. R sq = 0.26). This set of independent variables can only explain about 30% of variability in mean concern level.

Table 8

Estimated coefficients for the stepwise procedure for Concern

	Estimate	Effect	Std. Error	t-value	Pr(> t )
Intercept	-1.42		2.32	-0.61	0.55
HDI	5.29	Strong Positive	2.86	1.85*	0.08

(continued)

Table 8 (continued)

Pol. Stab. & Absence Viol.	-0.55	Small negative	0.19	-2.83**	0.009
Gvt. Effectiv.	-1.28	Moderate Negative	0.38	-3.34**	0.002
Regulatory Quality	0.25	Not significant	0.18	1.36	0.19
Rule of Law	1.03	Moderate Positive	0.39	2.67*	0.01

Note: Adjusted R-squared: 0.26; Stars correspond to the level of statistical significance (\*p < .01; \*\* p < .001; \*\*\* p < .0001)

The correlation between Education and Concern was very small,  $r = .15$ . Similarly, the correlation between Education and Concern for the majority of people was only .17, less than moderate. This may mean that the population without disabilities is not trained through courses or programs in school on how to cope with the presence and needs of people with disabilities:

Correlation index between Concern and mean Education level = 0.15

Correlation index between Concern and Education level for majority of the people = 0.17

**Comparison case for Concern.** In the case of the Concern variable, a good example is the comparison between the countries with highest (Turkey = 3.36) and lowest (Belarus = 1.97) values for the Mean Concern Score. Table 9 shows the distribution of Concern data across its 5 levels and the country values for the variables significant in the Final Model for Concern. Figure 5 shows that the 5 levels of Concern for Turkey and Belarus are distributed very differently, with the levels of Concern changing directions of skewness for the two countries.

Table 9

Data Comparison for Countries with Highest (Turkey) and Lowest (Belarus) Mean Concern

Score

Country/Indices	V Much Concern	Much Concern	Concern	N Much Concern	N at All Concern
Turkey	0.54	0.34	0.09	0.02	0.01
Belarus	0.12	0.23	0.39	0.17	0.08

Country/Indices	HDI	I2	I3	I4	I5
Turkey	0.761	-0.97328	-0.05382	0.25316	-0.09248
Belarus	0.786	-0.08193	-0.77696	-1.89418	-1.0166

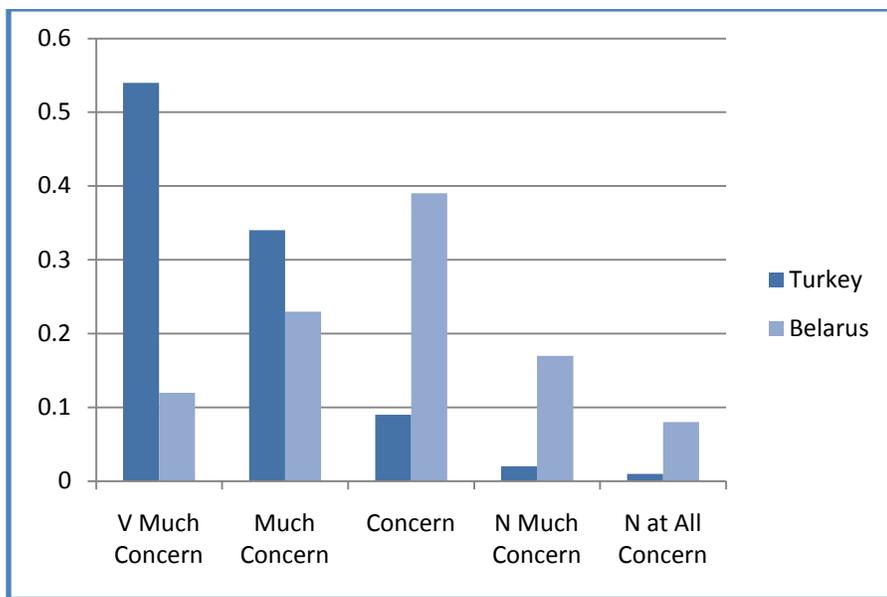


Figure 5. Direct Comparison between the 5 Levels of Concern for Turkey and Belarus

Figure 6 displays the difference in the level of human development levels between Turkey and Belarus, which, interestingly, indicate that Belarus has a greater HDI level than Turkey. However, the rest of the independent variables that are added to the significance model, i.e., I2 through I5 (see Figure 7), evidence a sharp difference between the two countries, and help to explain the statistical significance between the Concern levels in Turkey versus Belarus.

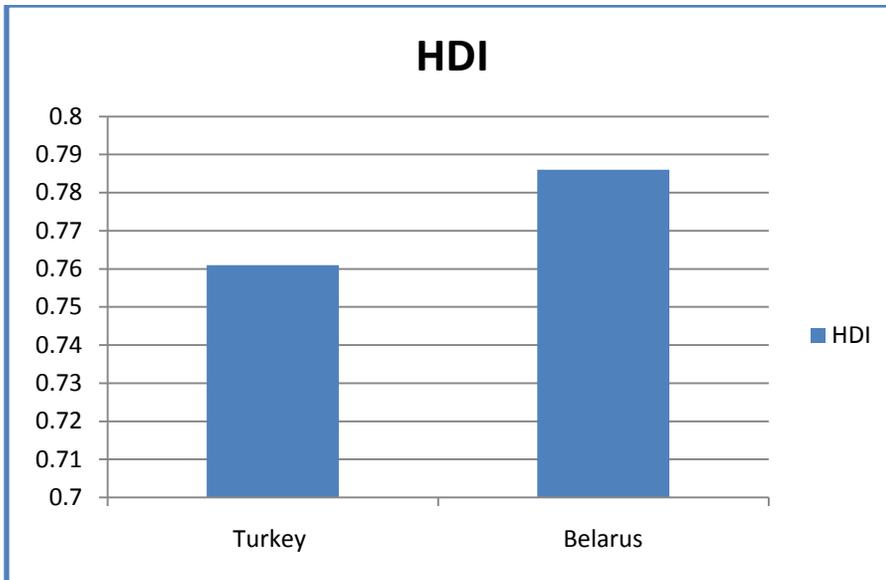


Figure 6. Direct Comparison between the HDI Level for Turkey and Belarus for Concern

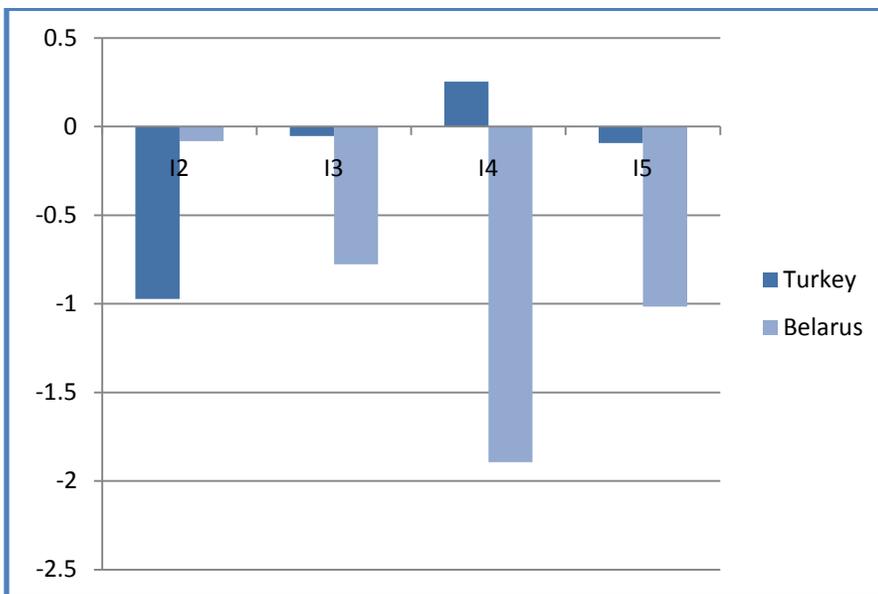


Figure 7. Direct Comparison between the Significant WGI Indices for Turkey and Belarus (Political Stability and Absence of Violence - I2; Government Effectiveness - I3; Regulatory Quality - I4; and Rule of Law - I5)

## Conclusions

The  $R^2$  for the two regression equations indicates how much variability in the mean Concern and Preparedness levels can be explained by a set of explanatory variables. In conclusion, the level of mean Concern and Preparedness levels (per country population) can be

explained by the HDI and WGI variables by using linear regression. Nevertheless I need to admit that I cannot explain the variability in Concern level as well as in Preparedness level using the same original set of explanatory variables. The third hypothesis, which states that the level of education can explain the mean levels of concern for and preparedness to improve the conditions for people with disabilities, did not find support in the data that I analyzed.

The results showed that the greater the level of national development, and the greater the freedom of expression and freedom to participate in elections, the greater the readiness to work to improve the conditions of people with disabilities and various illnesses. As far as the control of corruption variable, it is interesting to find out that the lesser the corruption, the more prepared the society is to work with people with disabilities. One possible explanation is that the more corruption in a country, the less money are invested in public expense, including in the caring for people with disabilities, and, hence, a country would not have enough professionals, but families, that take care of their family members affected by disability. However, these would remain isolated cases, which, without the assistance of the government and their communities, would only propagate the status quo and the marginalization of the population with disabilities. Also, less money would be invested in educational programs that prepare the population to deal with disability issues. More money invested in the education and health of people with disabilities would make them more mobile, more visible, and more active, which provides the occasion for the communities to observe and understand the strengths, not only the weaknesses, of the population with disabilities. Another possible explanation is that too much regulation and bureaucracy tend to minimize inclusive educational programs, and hence decrease exposure to issues of disability, which, in turn, decrease the readiness of the population to manage people with disabilities, until they are forced to do so by caring for their loved ones with disabilities.

As far as the Concern variable, the results show that the greater the degree of national development and the greater the law enforcement, the greater the interest a country's population has in helping other people, including the people with disabilities. Indeed, my experience from the former communist dictatorship in Romania, when poverty was flourishing, and laws were not enforced, is that the population was so preoccupied with the everyday struggle for basic survival and security, that merely a few people thought of asking the natural questions of "What happens with people with disabilities? Where are they? What is their quality of life?" Even if these questions were asked, the fear of repercussions was so great, that they remained rhetorical (see more on this topic in Walker, 2010, and Walker, 2011).

The Concern variable is negatively related to the independent variables Political Stability and Absence of Violence and Government Effectiveness. In other words, the less political stability and absence of violence and the less government effectiveness, the greater the concern or worry the society has for people with disabilities. Similarly, if the quality of public and civil services, the quality of policy development and enforcement, and the credibility of state are greater, the smaller the worry and anxiety for the wellbeing of people with disabilities. However, this is somewhat an oversimplified interpretation of the results, because none of the independent variables is significant by itself, but only in combination with the others from the subset.

It was expected that the coefficients of the educational variable would exhibit significantly positive effects in both regressions, indicating that the greater the degree of formal education invested into the population, the greater the concern and preparedness of the people to deal with disabilities. However, as tested herein, education has no statistical impact on the concern and preparedness of people to handle situations where people with disabilities are implicated. This can only mean that formal education does not incorporate classes that raise

awareness or concern in students for their peers with disabilities. Nor does formal education prepare students to deal with people with illnesses or disabilities through formal education. The recommendation that follows from testing the third hypothesis is that everyone should have some exposure to how to react in the presence of sick people and people with disabilities and how to deal at a basic level with their needs because the occurrence of disability is so pervasive in our societies today. The phenomena of disability and illness are still hidden, marginalized, kept invisible, but more exposure to general and specific problems related to disability and sickness, would increase the general populations' interest for and readiness to work with people with disabilities. Recommendations to remedy the situation include: short courses introduced since primary schools on how to deal with diversity (including disability) and a wider inclusion into typical schooling settings.

Because the results of this analysis did not show an impact that the level of education has on the concern for and readiness to improve the lives of people with disabilities, it means that there are other factors independent of education or that education in combination with other factors may have an effect on the two dependent variables. The interpretive analysis discusses several theories and factors that can affect changes in society's attitudes and ways of improving the education and lives of people with disabilities. A few of these factors will add quality information to the quantitative results that human development and democracy constitute catalysts for the advancement of human rights, including human rights-based education, either by highlighting various components of these two variables, or by showing how they impact a country's population concern for people with illnesses and disabilities and preparedness to change the status quo and better the lives of people with disabilities.

Also, it is important to remember that these results are limited to the attitudes and knowledge of people mostly educated in European countries, which promote Western values on disabilities and inclusion, democracy, and human development. If data from other regions of the world were available on the two dependent variables, the quantitative results may be different. An interesting fact to observe is that in the Preparedness statistical model, the good governance is completely not selected in the model, hence, not significant, while in the Concern model, it is mainly the good governance aggregate that is significant in the model. In agreeing with Phillips and Burbules (2000), “we insist that there are many causal chains operating in the social realm, at both the microlevel and the macrolevel, which can be studied naturalistically.” In conclusion, this quantitative analysis showed that both democracy and development act as catalysts for disability rights and for the intention of changing the attitudes towards disabilities and people with disabilities.

### **Qualitative-Interpretive Method**

In this section, I complement and expand the results of the quantitative methodology, by exploring various authors’ theories, commenting on their perspectives, and exploring possible factors that would facilitate full inclusion of people with disabilities into the mainstream social, educational, and employment settings. I do so by incorporating human rights perspectives, and by developing a more comprehensive model for providing better access to education and providing the kind of education that fosters the maximum development of the human potential for people with disabilities. As methods of analysis, (a) I interpret texts, events, human actions, concepts and narratives, (b) I analyze United Nations, European Union, and United States conventions, legislation, and administrative policies, and (c) I pay attention to the interpretation of culture, practices, and artifacts, including analysis of language, in understanding the patterns

of inclusion, exclusion, and the dynamics of power that influence the education and the lives of people with disabilities.

My aim is to discover the world as seen through the eyes of others, such as the people without disabilities, various philosophers, and data gathered by expert researchers from the UN, EU, and US. I intend to understand the social structures within the world of people without and with disabilities, making use of the principle “people sharing common circumstances (...) share patterns of meanings and behavior as well” (Hutchinson, 1990, p. 126). In order to reach my objective, I use both constructivist and subjectivist epistemologies. I use objectivism only sporadically, such as the theory of complex systems, and the quantitative analysis conducted by a computer software, but this trend is not dominant in my study.

Within a constructivist epistemology, symbolic interactionism provides the theoretical framework for the interpretive study. This is an approach elaborated in the late nineteenth century by Charles Peirce, William James, and John Dewey and developed further by George Herbert Mead and Herbert Blumer. Symbolic interactionists have developed several guiding premises in order to define the focus of this theoretical framework, which I review here, as I identify with these principles and they inform my research:

- 1) People are unique creatures because of their ability to use symbols (for example, laws, gestures);
- 2) People become distinctively human through their interaction (for example with the policies and others' practices);
- 3) People are conscious and self-reflexive beings who actively shape their own behavior (i.e., capability to change practice according to policies);
- 4) People are purposive creatures who act in and toward situations (e.g., teaching obeying the educational laws);
- 5) Human society consists of people engaging in symbolic interaction;
- 6) People act on the basis of the meanings they give to things in their world. (Sandstrom et al., 2001, p. 218-219).

Unlike objectivism, subjectivism is not concerned with the objectivity of knowledge and its becoming for the subject, but it represents a way to conceive the subject (Sanchez & Loredó,

2009). Sanchez and Loredó provide a genealogy of subjectivist perspectives, of which I adopt several: (a) Edinburgh School (Barnes, 1987; Bloor, 1991; Barnes & Bloor, 1982), which contend that negotiations and consensus are the basis of scientific outcomes, according to common interests; (b) Humberto Maturana's (1988, 2004) belief that humans as observers and 'autopoietic machines' define their relation to the world; (c) Heinz Von Foerster's (1982, 1984) view that the spectator establishes his or her own mental reality, which is linked to the systems theory and emphasizes that the subject is only an observer that describes things that represent themselves; and (d) Paul Watzlawick (2004) that language and communication technologies (discourse) are the ones that define reality.

The interpretive results are contained in the next four chapters and they are built on Kofi Annan's recommendations from the UN *Statement of Common Understanding* on how the HRBA approach can be embedded in any programme (UNCF/UNESCO, 2007). The first principle requires that through assessment and analysis, one identifies the claims of human rights in education and the corresponding obligations of governments, as well as the immediate, underlying and structural causes of the non-realization of rights. To reflect this principle, I will start my interpretive analysis with an assessment and analysis of disability rights in education, looking at United Nation, United States, and European Union Perspectives Educational Rights Provisions for People with Disabilities (Chapter 3).

The second principle asks that programmes estimate the capacity of individuals to claim their rights and of governments to fulfill their obligations, upon which strategies can be developed to build those capacities. In response to this principle, I look at the people with disabilities as rights-holders and duty-bearers and discuss the importance of investing in special capital in the context of global development (Chapter 4).

The third principle suggests that programmes monitor and evaluate the outcomes and the processes that are guided by human rights standards. Therefore, the next chapter deals with the impertunity of evaluating the UN World Programme of Action Concerning People with Disabilities from multiple perspectives, using it as an example of why and how to monitor and evaluate educational human rights outcomes and processes (Chapter 5).

The fourth principle mandates that programming should stem from recommendations of international human rights bodies and mechanisms. Hence, the fourth chapter from my interpretive results will focus on programming that fosters development of the capacity of people with disabilities, that is, planning for an ecology of disabilities and ecoducation for people with disabilities, based on the HRBA Approach (Chapter 6).

The specific methods of investigation used in this section to look at the social and educational situation of people with disabilities, are based on the adoption, critique, and additions to selected relevant theories and systems of thought, including: (a) critical disability theory; (b) human development approach (HDA); (c) economic, specifically the liberal, approach to investment in the education of people with disabilities; (d) other philosophical approaches, such as the ones developed from the work of Michel Foucault, Pierre Bourdieu, Henry Giroux, Martha Nussbaum, and Amartya Sen; (e) policies and legal provisions related to educational rights for people with disabilities; and (f) ecological theories, such as the ones developed by Gregory Bateson and Urie Brofenbrenner.

## Chapter 3

### **Interpretive Methodology Results - Assessment and Analysis of International Disability Rights in Education: United Nation, United States, and European Union Perspectives Educational Rights Provisions for People with Disabilities**

A convention, synonymous with the term treaty, is a legally binding document, a formal multilateral agreement, a source of law different from customary law and general principles of international law. A declaration can denote various international documents, but it usually announces certain aspirations and it does not generally create legally binding obligations, unless so specified, in which case it becomes a treaty (UN Treaty Collection, 2010). In this section I look at instruments agreed upon at three levels: the United Nations conventions, declarations and programmes; European Union's conventions, declarations, and plans of action; and the United States of America' laws. These instruments represent mainly a Western perspective on human rights, although they could also possible reflections of other cultural or religious philosophies. Since Western debates and country positions and actions have a high impact on the UN texts on human rights issues, and to remain consistent with the Western perspective (or restrictions of interpretation of the quantitative analyses from this study), I choose to interpretively examine only these instruments. Although they do not affect in the same way the individual, who is first a citizen of his or her state and then a global citizen, they all describe either educational rights and responsibilities or aspirations for people with disabilities, but at different levels: international, regional, and national. I will discuss closely the legally binding documents whenever they are available.

#### **United Nations**

There are several international measures that pertain to the rights of people with disabilities, such as instruments that refer to either the general rights of any human being [International Bill

of Human Rights made of Universal Declaration of Human Rights (UDHR; 1948), International Covenant on Civil and Political Rights (ICCPR, 1966), and International Covenant on Economic, Social and Cultural Rights (ICESCR; 1966)]; to people with indigenous, and diverse ethnic and racial background [International Convention on the Elimination of All Forms of Racial Discrimination (CEFRD;1965)]; to women who also have disabilities [Convention on All Forms of Discrimination against Women (CEDAW; 1979)]; to children and children with disabilities [Scientific and Cultural Organization's Convention against Discrimination in Education (1960), UNESCO Convention against Discrimination in Education (1966), Convention on the Rights of the Child (CRC; 1989), and World Declaration on Education for All, Meeting Basic Learning Needs (1990)]; to development, in general, as a right [Declaration on the Right to Development; 1986]; specifically for people with disabilities [Declaration on the Rights of Mentally Retarded Persons (1971), Declaration on the Rights of Disabled Persons (1975), Salamanca Statement and Framework for Action on Special Needs Education (1995), Convention on the Rights of Persons with Disabilities (CRPD; 2006)]; and in regard to people needing vocational and technical training [UNESCO Convention on Technical and Vocational Education (1989)]. Again, I will focus on the rights to education at large, including education at all levels, vocational training, and lifelong learning for people with disabilities. I will center my discussion on the treaties that pertain to education rights for people with disabilities, namely the ICESCR, the CEDAW, the CRC, and the CRPD.

Article 13 (1) of the ICESCR (2007) posits that "States Parties recognize the right of everyone to education", which can be interpreted to mean that people with disabilities should have effective access to education, appropriate to their abilities. The CEDAW (2009) states generally that girls and women have the right not to be discriminated against in specified areas,

such as health care, education, employment, treatment under the law, and rights in the marriage and family. The Article 23 (2) of the CRC (2007) entitles children with disabilities to special care, and Article 23 (3) provides that assistance to the child and those responsible for his or her care will be formulated as such to ensure the provision of effective access to education, training, health care services, rehabilitation services, preparation for employment and recreation opportunities “in a manner conducive to the child's achieving the fullest possible social integration and individual development ” (CRC, 2007). Besides the inclusive education, the CRC also provides that services for children with disabilities should, when possible, be provided free of charge [article 23 (3)].

Adopted in December 1982, the UN World Programme of Action Concerning People with Disabilities was considered a paramount for announcing a plan of action for achieving disability rights internationally. The UN Convention on the Rights of Persons with Disabilities (CRPD, 2006) and its Optional Protocol were adopted on 13 December 2006 at the United Nations Headquarters in New York, and opened for signature on 30 March 2007, entering into force on 3 May 2008. To present, 147 states signed and 95 countries ratified the Convention and 18 states have expressed reservations, declarations, and understandings. The CRPD was drafted on several previous instruments such as the ICESCR, the International Covenant on Civil and Political Rights, the International Convention on the Elimination of All Forms of Racial Discrimination, the CEDAW, the Convention against Torture and Other Cruel, Inhuman or Degrading Treatment or Punishment, the CRC, and the International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families. The CRPD recognizes the importance of the principles and policy guidelines contained in the World

Programme of Action concerning Disabled Persons and in the Standard Rules on the Equalization of Opportunities for Persons with Disabilities (CRPD, 2006).

The convention reaffirms that all persons with all types of disabilities should enjoy the benefit of human rights and fundamental freedoms. This is a comprehensive human rights treaty with explicit social development dimension that signals a shift in perception of persons with disabilities from being viewed as “objects” of charity, medical and social protection to being “subjects” with rights, being active participants to their development, rather than passive recipients of services. It recognizes that disability is an evolving concept and that “disability results from the interaction between persons with impairments and attitudinal and environmental barriers that hinders their full and effective participation in society on an equal basis with others” (CRPD, 2006). According to the CRPD, states should take policy and legislative measures and report on efforts to protect girls and women with disabilities on multiple levels. Several directions, that these efforts need to be channeled in, include standards of living and social protection, childhood, gender-specific measures, education, and, because women are also mothers, home and family measures are also important.

Article 24 of the CRPD sets the provisional context for ensuring education for children and adults with disabilities. The general framework is one equal opportunity, inclusive education, and lifelong learning. The importance of early childhood special education and access to mandatory schooling, as well as access to all levels of schooling, mandatory or not, together with appropriate diagnosis and identification are acknowledged. Gender equality, appropriate and effective education (from individualized and accommodating teaching methods and materials to communication and transportation), as well as full inclusion are also foreseen. Further, emphasized are the linguistic identities and cultural environments appropriate for

appropriate education. Other provisions include the education of professionals who assist in the education of people with disabilities, including people with disabilities that assist others; access of people with disabilities to all fields of study; and lifelong learning for people with disabilities. Article 26 includes support for vocational ability enhancement for habilitation and rehabilitation, while Article 27 specifies that the CRPD promotes vocational and professional rehabilitation.

### **European Union**

The 1953 European Convention for the Protection of Human Rights and Fundamental Freedoms (1950) protects the basic rights and freedoms of all Europeans. Although the European Social Charter (1965) regards disability rights through a traditional institutional prism, this is the first treaty that pertains to disabilities, and the education of people with disabilities. Article 15 confers the right of people with physical and mental disabilities to vocational training, rehabilitation, and social resettlement (i.e., social integration in community). The European Social Charter was revised in 1996, and now foresees the right to “independence, social integration and participation in the life of the community” for people with disabilities in signatory States and requires States to take measures to “promote their full social integration and participation in the life of the community” (Art. 5).

The more recent 2006 European Instrument for Democracy and Human Rights (EIDHR) is a programme that acknowledges and furthers human rights and democracy worldwide through civil society projects. For a long time, the EU has not adopted a clear legislation in the area of disabilities, except the one focused on employment of people with disabilities (i.e., the Employment Directive adopted in 2000), the remaining rights being left at the discretion of the states (EUR-Lex, 2010). The fact that the Employment Directive took almost 7 years to be adopted and enforced in the Member States (EDF, 2010) and the possible reluctance from the

Member States from adopting a more comprehensive set of policies on disabilities (conceivably due to a focus on other regional problems, such as financial and security stability) have created a gap between the international disability rights legislation and the reality of the EU. However, recently, the rise in advocacy and the globalization of communication means have brought a great openness in the European Communities' attitudes towards disabilities. In addition, beginning with 1995, the European Community has included a human rights clause in all agreements, except for the sectoral agreements.

The Council of Ministers of the Council of Europe has adopted a series of resolutions that bestow education rights for people with disabilities, including access to information technology, such as Resolution of the Council and the Ministers for Education meeting within the Council of 31 May 1990 concerning integration of children and young people with disabilities into ordinary systems of education; Resolution of the Council and of the Representatives of the Governments of the Member States meeting within the Council of 20 December 1996 on equality of opportunity for people with disabilities; the Council Resolution of 5 May 2003 on equal opportunities for pupils and students with disabilities in education and training, and the Council Resolution on 6 February 2003 "eAccessibility". The European Parliament has also adopted two resolutions on the rights of persons with disabilities, the Resolution on the Rights of Disabled People, and the Resolution on the Human Rights of Disabled People. Finally, the European Union Disability Strategy (2010) is reflected in the Communication on Equality of Opportunity for People with Disabilities - A New Community Disability Strategy 1996, which was adopted to carry out the United Nations Standard Rules on Equalization of Opportunities for Persons with Disabilities.

On 26 November 2009, all the EU Member States and the Community signed the UN Convention on Rights of Persons with Disabilities (CRPD) and 17 Member States signed the Protocol of the Convention. Hence, although the ratification of the CRPD was not the trigger for developing the European Disability Strategy in 2004, it is clear that the EU states have to express their commitment to decrease and end discrimination against and social exclusion of people with disabilities in the new European Disability Strategy in 2010. The UN Convention binds the State Parties to revise the existing legislation, policies, and programs to ensure they are in compliance with its provisions. As a consequence, it is the duty of the EU to develop effective strategies as a way to protect the rights of all Europeans with disabilities.

The Commission of the European Communities (2007) points out that the European approach to disability has had a major impact on the content of the CRPD, viewing disability as an evolving concept and hence using the European social model of disability. The EU institutions worked together for the designing and implementing the European Disability Strategy (2004-2010) and advocating for the European Disability Pact. The Disability Action Plan (DAP) 2003-2010 was built on three pillars: antidiscrimination, mainstreaming or inclusion measures, and accessibility or equal opportunities (European Commission, 2009). These core elements of the EU disability approach are reflected in the CRPD. However, it was the UN who took the initiative in drafting a Convention for people with disabilities, while the EU is still drafting a programme of action for the next decade (the new Plan is not yet available on the European Commission website). Hopefully, if we are to judge by the past, when Europe followed the international example of firstly setting up a programme of action and then set up a human rights treaty to mirror the principles set in the plan or strategy of action, the EU will soon draft a regional convention for the protection of the rights of people with disabilities. Such a

regional treaty is necessary for Europe for several reasons: (a) a greater focus on socio-cultural issues related to disability, such as social exclusion, integration of migrants, bio-ethical issues; (b) giving a voice to regional human rights issues, such as travelling within the EU space; (c) adherence to legislative regional provisions regarding disabilities; and (d) providing a regional Court to resolve disputes related to disability rights.

The common European approach to disability has had a major impact on the content of the UN Convention, which recognises disability as an evolving concept, thus reflecting the European social model of disability. Furthermore, the main elements of the EU approach, which combines non-discrimination, equal opportunities and active inclusion, are at the core of the UN Convention (Commission of the European Communities, 2007).

However, new variables have developed since the inception of the European Disability Strategy and which are incorporated in the 2010-2020 version of the plan, meant to be a long-term guide for disability policy at the European level: (a) enlargement of the EU to 27 member States; (b) the signing and ratification of the CRPD, which surpasses the European vision on disability rights; (c) a focus on the rights aspect of the people of disabilities, as having the same rights as non disabled persons; (d) stronger advocacy and, hence, more robust governmental and non-governmental belief systems and organizing; and (e) expanded and more accurate data that identifying obstacles of persons with disabilities.

The Disability Pact builds on existing policy instruments on international, European and national levels, and reflects that persons with disabilities have the right to systematic improvements of their living conditions and have their equal rights ensured through law and policy. The DAP 2003-2010 was built on three pillars: antidiscrimination, mainstreaming or inclusion measures, and accessibility or equal opportunities. The DAP is built in two-year phases with policy priorities that respond to the equality breaches that people with disabilities face in their day to day reality (European Commission, 2009). It is intended to ensure inclusiveness of education systems, employment of persons with disabilities, adequate social protection of

disadvantaged groups, as well as accessible markets, infrastructure and services. The Pact will give a clear long term direction to disability policy at European level and will provide governments with a guideline so that they will negotiate or directly translate the EU 2020 goals on disability rights into effective national pieces of legislation and a path of action.

Because “it is the first time in its history that the European Community accede[d] to an international human rights treaty” (REHACARE International, 2009), a specific commitment to the alignment of the EU Disability Action Plan (DAP) with the UNCRPD needs to be stated and reflected in a new and comprehensive European Disability Strategy 2010-2020. Other important factors that should be incorporated into the content of the successor of the Disability Strategy are discussed as follows.

Evaluations of the second (2006-2007) and third phases (2008-2009) of the Disability Strategy and Action Plan should state which policies are still relevant for the successor strategy, what were the successful instruments and methodologies of implementing the policies, and what are the outcomes of the 2004-2010 set of policies. Based on this, identification of the areas for collaboration at the EU level and of the areas priorities for common action needs to occur.

In the last decade, the term ‘inclusive growth’ has become the highlight of the disability rights policies, and a comprehensive explanation of its meaning is due in this strategic plan, namely that disability rights will contribute to personal development and concomitantly to the economic and societal ‘growth from within’ of the European post-modern civilization. For ensuring a full citizenship participation, new areas should be tackled in the new European Disability Strategy for 2010-2020: accessibility; employment; education and lifelong learning; healthcare; free movement and transportation; independent living, institutionalization and services in the community; participation in political and public life, such as access and training to

using new ICTs; participation in cultural life, recreation, leisure and sport; adequate standards of living and social protection, liberty and dignity; and self-governance (Commission of the European Communities, 2007). Also, ways of monitoring and dating the EU progress regarding the disability rights should be achieved through the development of consistent and comparable data and indicators, which will also be used to meet the requirements of the UN on monitoring and reporting on the implementation of the CRPD.

*United States of America.* As part of the US foreign policy, it is worth mentioning that the US and Somalia are the only two remaining states that did not ratify the CRC, but the US is in the process of reconsidering its ratification. Also, the US signed the CRPD on 30 July 2009, but did not ratify it as of yet. The right to education is not made explicit in the US Constitution, but, like many social welfare issues, it is viewed as a protection that is the obligation of the states (Henkin et al., 2009).

The case of the U.S. is a good example of a long negotiation between domestic and international law. Henkin (1995, p. 341) puts together 5 principles that he believes guide the U.S. policy on human rights treaties, namely: (a) the U.S. will not undertake any treaty obligation that it will not be able to carry out because it is inconsistent with the U.S. Constitution; (b) U.S. adherence to an international human rights treaty should not effect – or promise – change in existing U.S. law or practice; (c) the U.S. will not submit to the jurisdiction of the International Court of Justice (ICJ) to decide disputes as to the interpretation or application of human rights conventions; (d) every human rights treaty to which the U.S. adheres should be subject to a ‘federalism clause’ so that the U.S. could leave implementation of the convention largely to the states; and (e) every international human rights agreement should be ‘non-self-executing’.

Principle number 4 would explain why the U.S., as a federation of states, did not yet commit, and

perhaps will never fully commit without reservations, declarations, and understandings, to the ratification of CRC, CRPD, and other international treaties. The rest of the principles confirm the theoretical background built throughout this study and reinforce my intuition about the testable hypotheses announced herein. On a domestic level, opponents of the US ratification of international documents “worry that the United States would take its commitments more seriously and thus go too far in trying to follow recommendations of the U.N. expert committee” (Crary, 2009). Also, a highly democratized state is less likely to “submit to the jurisdiction of the International Court of Justice to decide disputes as to the interpretation or application of human rights conventions” (Henkin, 1995, p. 341). King and Piper (1990, p. 148) discuss legal system-related obstacles which apply to the case of U.S.: (a) a litigious culture; (b) an adversarial nature of the proceedings; (c) an extensive use of lawyers; (d) the use of part-time, non-professional, or non-specialist judges; and (f) the emphasis on the qualifications of information sources at the expense of the reliability of information. In light of all the arguments brought in this paragraph, the fact that the US did not ratify the CRC and CRPD conventions is potentially both detrimental and beneficial: (a) detrimental because disability rights cases cannot be acceded to the ICJ, hence the law of the land is the ultimate word; and (b) beneficial because of the litigious culture and the high level freedom of speech and advocacy rights in the US, disability rights have the potential to develop faster than they are foreseen in the international treaties and, hence, serve as models of advancement for disability rights.

The first federation law that referred to the education of the children with special needs was the Elementary and Secondary Education Act of 1965, and ensured funding for state provision of education for children with disabilities. In 1973, Congress passed the Vocational Rehabilitation Act, of which Section 504 entitles persons with disabilities not to be discriminated

in education, employment, housing, and access to public programs and facilities. In 1974, the Education for All Handicapped Children Act (known as PL 94-142) entered into force and it was soon amended and renamed in 1975 into the Education of the Handicapped Act, considered the basis of all ulterior special education practice, such as setting up identification measures to ensure provision of special services for all children who did not previously received them. The law requested states to provide Free Appropriate Public Education (known as FAPE) to children with disabilities, who had the right to be educated in the least restrictive environment (known as LRE) with their peers to the maximum extent appropriate, hence setting the legal foundations for mainstreaming and inclusion. It also stated the right of a student with disabilities to have an Individualized Educational Plan (known as IEP) and guaranteed due process to students with disabilities and their families. After several reauthorizations, in 1990, the new amendments were gathered into a new law called the Individuals with Disabilities Education Act (IDEA), to reflect the ‘individuals first’ language principles. The Carl Perkins Vocational and Applied Technology Act of 1984 encourages the vocational education to be included in students’ IEPs and their delivery in mainstream environments. The Americans with Disabilities Act (ADA) of 1990 and its authorization of 2004 forbids discrimination on the basis of disability in employment, State and local governments, public accommodations, commercial facilities, transportation, and telecommunications. It expands on the Section 504 by addressing discrimination indiscrimination in programs not receiving federal funds, except in churches and private clubs, and by providing rights for individuals with HIV/AIDS (Friend, 2008; Salend, 1994; U.S. Department of Justice, 2005).

The No Child Left Behind (NCLB) of 2001, a reauthorization of the Elementary and Secondary Education Act, was meant to promote academic achievement for all students across

the US by establishing the academic year of 2013-14 as the deadline for public schools to ensure reading and math proficiency to students. Further, it increased public school accountability by means of evidence-based practices and student performance, and it aimed that all students will graduate from highschool. Because of the increase of inclusion provided by LRE and FAPE, special and general education systems are becoming united into one comprehensive system, where all the NCLB provisions apply. Thus, in 2004, President George Bush signed into law a new version of the IDEA, named Individuals with Disabilities Education Improvement Act (IDEIA), aligning it with NCLB provisions and improving the outcomes for the students with disabilities. IDEIA includes provisions for ensuring that special education services are delivered by highly qualified personnel, increasing accountability and Adequate Yearly Progress (known as AYP), requesting for reliance of educators on peer-reviewed research, refining the eligibility requirements (the most important modification being that if a child's problem resulted from a lack of empirical based instruction, the child will not be identified to have a disability), modifying the development of the IEP, and disciplinary removals (Yell, Shriener, & Katsiyannis, 2006). These laws reflect to a great extent principles of human rights for people with disabilities as outlined in international documents, however tailored to the United States' legal and education systems.

In conclusion, in this chapter, I lead a quest to comparing the international, European Union's, and United States' measures pertinent to the educational and vocational training of children and adults with disabilities. Disability is a pervasive condition, worldwide, in Europe, and in the Unites States, that can no longer be ignored. People with disabilities are still excluded both from society and mainstream education. Educating people with disabilities is second in importance only to promoting education for women (e.g., UNCF/UNESCO, 2007), and they

constitute a necessary human capital potential both from neoliberal and human development perspectives, and whose quality can only be raised through investment in health, and education and vocational training.

The right to education for people with disabilities started with a general statement from UDHR that proclaimed equality and that primary education should be free and available to all children. Ultimately, the UN Standard Rules on the Equalization of Persons with Disabilities (1993) is the principal document, which forms the basis for the rights-based approach to disability and which the regional standards and national legislation should be following. This work continued with several global human treaties, culminating with two recent Conventions that further reinforce the education of all children and the education for people with disabilities. The CRC builds upon four principles: non-discrimination; the best interests of the child; the right to life, survival, and development; and the right to have a say in all matters affecting them, according to their age and maturity. CRC was the first human rights convention that included specific references to disability and had a separate article (23) exclusively dedicated to the rights and needs of children with disabilities. The CRPD is the first legally binding policy instrument, which is cross-disability and cross-sectoral, and which promotes both development and human rights. Similar to some extent to the CRC, the CRPD has several pillars, such as: non-discrimination and equal rights; participation and inclusion; accessibility; individual autonomy and independence, including the opportunity to make their own choices; and, overall, a consideration for the dignity and full enjoyment of the lives of people with disability.

While the basic rights of human beings are protected both by international and European regulations, as of yet, the European Union did not set up a comprehensive set of legally-binding rules or a treaty that deals with disability issues, including the right to education, but the fact that

the EU is updating the European Disability Strategy for the next decade (2010-2020) is encouraging. Besides the human rights of people with disabilities, a strong incentive for updating and enlarging the scope of the Disability Strategy is an economic one for the EU. Due to population ageing in the Member States, the labor force is decreasing while the welfare dependency is increasing. Alongside with immigrant workforce, people with disabilities constitute a great potential for expanding the labor market. On the other hand, the market for accessible products is growing and is becoming a driver for innovation and new legislation will create new services that will, in turn, employ more people (Commission of the European Communities, 2007).

Although these three examples start from the same idea of educational rights for people with disabilities, they differ in specificity and manner of enforcement. Although the international covenants are not directly enforceable by individuals, they are highly influential both at the EU level and within member-states. The European Court of Justice has ruled according to the human rights derived from such instruments as they form part of the general principles of European Community law. The more localized the provisions become, the more specific to the population's identity. For example, the UN conventions and programmes remain state-of-the-art standards for the entire global population, creating the space for cultural adaptation and accommodation. They also have vague ways of enforcement attached to them. As we zoom in closer to national levels, the decision-making process is decentralizing and the enforceability of the disability rights becomes more possible. The EU Plan gets more specific and sets guidelines of action, while the US laws operationalize the national desired behaviors and its population's expectations regarding the fulfillment of educational disability rights.

All these instruments incorporate educational disability rights values that embody Northern and Western values of human rights patterns and dispositions. These values argue for a structure of human relations that sustain the freedom to choose and be the creator of one's self life (auto poiesis or self-creation), including the right to receive guidance for how to make informed choices and how to survey what is available, through education. Both in the United States and Western Europe, disability organizations have often employed to gaining publicity and raising disability awareness through public protest and direct action, making use of the relatively high freedom of expression and convictions. These Western patterns of relational coexistence may differ from other national, regional, or ideologically-different social structures, such as the Chinese society, where the welfare of the state is above the goal of individual self-fulfillment, and where the autopoiesis is encouraged to the extent to which it contributes to the progress of the nation-state. Therefore, a universal framework of disability rights does not intend to change the structural fabric of a culture or domestic system, but it should be used as a guidance to ensure the respect for individual rights of people, who, in turn, will contribute to the betterment of the standards of the society and communities they live in. There are supporters of the idea that Western human rights are based on politically biased notions raised post-colonialism, culturally biased notions of reason, the individual, monotheistic religions, and the 'good society' (Henkin et al., 2009), which are sometimes misused in the service of national interests (Boyle, 1988; Kreide, 2005). Some regional human rights instruments, such as the Bangkok Declaration of the Association of South Asian Nations (ASEAN), the Banjul Charter of some African countries, and the two Islamic Declarations are centered on group and family rights rather than individual claims, emphasize more development and social rights rather than civil and political rights, and

look more into obligations rather than claims (Kreide, 2005). (An in-depth discussion of the US human rights foreign policy is not included in this study.)

The following EU presidencies, Spain and Belgium, will mediate the work on exploring a new subspace in international law and human rights law for people with disabilities. The work of organizations for people with disabilities remains of crucial importance in the processes of disseminating, influencing, and implementing the policies for persons with disability. The civil society and the public should also be consulted through local, national, and European online or on-site open forums. The identification of organizations contributing to the implementation of the CRPD and the development of the European Disability Strategy 2010-2020 should be done at multiple levels: bilateral and multilateral, European, national governments, regional and local administrations, non-governmental organizations, and should also include the private sector (Mainstreaming Disability, 2010). Achieving a common European Disability Strategy for 2010-2020 is one of the best ways to involve national stakeholders in the lobbying and consultation processes and to use and influence national legislation and plans of action as input and output for achieving a timely implementation of the CRPD. However, the UN and EU involvements should not be limited to aiding in the development of national legislations, elaborate indicators, and monitoring and evaluating progress, but it should also be extended to financial support, raising awareness, and research and development in the area of disability rights. In addition, the set of policies stemming from the UN and EU should be implemented in conjunction with other pieces of policy that provide anti-discrimination measures against other marginalized populations, such as women, immigrants, ethnic or racial difference.

Integrating and including this population in the society would complete the socio-cultural ecological system of a society in equilibrium, providing more opportunities for every member of

the society to find an existential niche. But this has been shown to be insufficient, hence, keeping in mind the human rights of children, adolescents, and adults with disabilities is of utmost importance. Thus, children would learn from an early age to understand, value, and preserve diversity, unique abilities (including forms of overcompensation of shortcomings, or splinter skills), freedom, physical and mental health, and other issues related to human experience. An ecology of disabilities would be based on an interconnectedness of all people, regardless of their race, ethnic background, ability or disability, level of education, etc. and on an understanding that as an effect of living together and benefitting from each other experiences everyone benefits naturally rather than in a planned, artificial, contrived manner. This type of natural benefits is the moral lesson that the people have to learn in order to truly experience participation in true citizenship.

## Chapter 4

### **Interpretive Methodology Results - People with Disabilities as Rights-Holders and Duty-Bearers: The Importance of Investing in Special Capital in the Context of Global Development**

While 15% of the world population is identified as having one or more types of disability (WHO & World Bank Report, 2011), the UN also estimates that about 80% of the world's population with disabilities lives in developing countries (UN Enable, 2003-04). This means that the rights to education and development of many people with disabilities are not met. As mentioned previously, a human right is a justified claim that ensures or contributes to the “well-being, dignity, and fulfillment” of a human being (Henkin et al., 2009, p. 43). Any discussion on rights implies a party that is entitled to that right (the right holder) and a party who provides that right (the duty-bearer). Commonly, duty-bearers are parents, governments, the international community (Right to Education Project, 2010). However, citizens are both right-holders and duty-bearers, for example, both initiators of change through voting and law followers or tax payers. Herein, I discuss the right to development through education as a fundamental right of people with disabilities, and ways that people with disabilities can contribute to economic and socio-cultural development, and to the entrepreneurial global spirit as duty-bearers. I also include a discussion about job training and workplace learning, as is relevant to closing the gap between schooling and skills (for example, Destre, Levy-Garboua, & Solloboub, 2008).

This chapter discusses the importance of adding people with disabilities, that is, the pool of special capital, to the global human capital in the context of current needs for sustainability, as they have the potential to be contributors to development and entrepreneurs in different ways: firstly, as entrepreneurs of the self, and, secondly, as economic and social growth agents, and thus directly or indirectly contributing to growth, innovations, and sustainability. In this analysis, I touch upon the human development perspective of capabilities of people with disabilities, but I

also tackle a neo-liberal position of investment in the education of human capital which includes people with special needs as a means of market and social growth.

The next subsections intend to provide a rationale and description of special economic and socio-cultural capital and their potential contribution to development. This manuscript is not about how to manage human capital, but rather the demographics of inclusive human capital (the 'who') and the rationale for it (the 'why'). My argument is that a wider inclusion and greater both government and private involvements in the education and training of persons with disabilities will result in economic, social, and other types of benefits for the entire society. I am going to discuss important issues related to the inclusion of people with disabilities from the perspective of a quantitative and a qualitative addition to the pool of human capital.

### **Special Capital**

Human capital refers to the sum of skills, knowledge, competences, and personality attributes of human beings that are used in the production process so as to produce economic value (Parnes, 1984), that is, formal and informal education, vocational and on-the-job-training, health, nutrition, and social services (Nehru, Swanson, & Dubey, 1993). By extension, I call 'special human capital', or simply 'special capital', the stock of abilities, knowledge, and personality traits of the population with special needs. Human capital adopts an economic neoliberal approach to development, focusing on how production can contribute to high rates of economic growth.

While human capital refers to the aggregate of skills, knowledge, and competencies that are used in the production process, Human Capability Approach (HCA) relays on the concept of 'functionings', capabilities, and agency (Sen, 1997). The concept of functionings refers to being or doing what people value; capability refers to a person's freedom or opportunity to enjoy

functionings; and agency refers to the ability to pursue valued goals (Deneulin, 2009). Hence, the HCA is based on outcomes and personal values of the individual that enable individuals to participate in current markets, adapt to change, and become active agents. Sen's Capability Approach, thus, emphasizes building the capacities of people to claim their rights, and to fulfill their obligations as duty-bearers. Reindal (2010) recognizes that the capability approach departs from the social model of disability in that in which it considers disability as a specific variable of human diversity, because it assists us in comparing people based on individual differences and it emphasizes people's abilities rather than categories of disabilities. If we are to talk about equity, impartial judgment, and the fulfillment of human rights, the focus should be not on the disabilities, but on the abilities of people, and on the departure of stereotyping people based on categories of disabilities (e.g., myths, such as children diagnosed with Down Syndrome are always sociable or have a low IQ). This way, we can talk more about enhancement of abilities, empowerment, human agency, and the provision of real opportunities.

The Human Rights-Based Approach (HRBA) reflects the value for human rights, as standards of claims that people are entitled to. Based on this approach, duty-bearers, such as parents, governments, and people with disabilities themselves, need to work to remove physical, social, and economical barriers for children and adults with disabilities. Under HRBA, even if the functionings (what people do and are) and abilities of the person are minimal, even so minimal so to barely allow survival, that person has the same right to a quality of life and respect he or she would have in the absence of disabilities. All people with disabilities can benefit from these 3 approaches (HAD, HCA, and HRBA), but people diagnosed with low-incidence disabilities, i.e. severely disabling conditions which generally do not exceed 1% of the school-aged population (NCAIM, 2010) (for example, blindness, deafness, autism, multiple disability)

may benefit more from a broader range and more intensive application of the human rights approach; and the people diagnosed with high incidence disabilities (for example, communication disorders, emotional and behavioral disorders, mild and moderate intellectual disabilities) can benefit more from the principles of the other two approaches. However, as mentioned in the first chapter, this study does not focus on any specific group of people with disabilities, and cuts across types of impairment and narrow definitions of disability.

In the context of populations with disabilities, special capital refers to the entirety of population with disabilities regardless whether they share a similar set of norms and values. However, subspecies of special capital can also refer to individualized or subcultures of people with disabilities, such as the subcultures of people with deafness, blindness, and, most recently, the rising population with autism. A differentiation between the various species of capital was made by the French sociologist Pierre Bourdieu, who used a sociological constructivist structuralist approach. He described social capital as “the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalised relationships of mutual acquaintance and recognition” (Bourdieu, 1986, p. 248). To parallel, special social capital refers to the sum of resources based on group membership, relationships, and networks of influence or the quality of the social networks of people with disabilities. Because this ecodeme is the victim of some form of marginalization, discrimination, and disempowerment across the world, we can safely assume that special social capital is limited by social circumstances. Cultural capital consists of the wealth of knowledge, experiences, dispositions, and attitudes an individual develops in his or her lifetime. Special cultural capital then is built through formal and informal education, is meant to develop patterns of behavior and values, and has the potential to enhance the special social capital. Symbolic capital refers to

resources based on honor, prestige, or recognition that one gains during his lifetime. Special symbolic capital is then the recognized economic or cultural capital.

Bourdieu linked cultural capital to “the disposal of taste”, that is, consumption of certain forms of cultural expressions that are preferred by members of certain social classes. Cultural capital can be broken down into two parts: a realized element, *habitus* or ‘style of life’ (Bourdieu, 1977), which includes perceptions, dispositions, and actions that reflect past experiences; and a potential element, formal and informal *education*, which shapes the ‘dormant’ attitudes and predispositions of the individual (Böröcz & Southworth, 1996). Lamont and Lareau (1988) support the idea that the cultural signals contained within the cultural capital are used for social and cultural exclusion. Granting the right to education to people with disabilities does not only change their habitus, but also enhances and organizes their latent traits, transforming them from passive to active members of society.

Bourdieu also stated that capital can be converted from one species into another, and, hence, it can be produced and reproduced. If I follow this liquid flow of transformation and apply it to the case of the population with special needs, special social capital (such as knowing the director of a good education or job training program) can be transformed, for example, into cultural capital (being accepted in the program despite low academic performance or despite the fact that other children with disabilities do not have access to this or any educational programs) and then into economic (having a better job upon graduation) and symbolic capital (recognition of the achievements). But, really, all the forms of capital are intertwined and grow co-dependently. James Coleman describes social capital as a social structural stock that the individual is anchoring his or her values in, and he also suggest a direct relationship between social and economic capital (Coleman, 1990). Special social capital development is targeted by

mainstreaming and inclusion trends, however special cultural capital is targeted by advanced forms of inclusion and by equity, meant to provide people with disabilities access to more than physical integration, that is, provide all the services that they would have if they had no ability limitations plus accommodation services to help them cope with the new circumstances.

### **Species of Special Capital and Potential Contributions for Development**

The discourse of human capital has changed over the years from a focus on numbers to its quality. For a long time, the discourse on human capital tended to overlook the marginalized groups such as the women, the poor, the racial and ethnic minorities, and it still continues to ignore the populations with disabilities. Adding populations with disabilities to the dynamics of human capital will modify both the quantity and the quality of human capital. While the exclusion and inclusion of disabled populations is a distinct phenomenon in many ways, aspects of it are also common to other groups that were marginalized and these experiences can contribute to a better understanding to the effectiveness of development policy and practice (Inclusion International, 2006).

As the privileged, who could afford investment in education, constituted in the past the elite of the human capital, so does today the 'abled' pool of human capital have preferential job access. Gradually, as the market supply and demand diversified, financial sources began to vary from credit to public investments and to constitute important sources of investment in education. Similarly, as human rights became more enforced and equal opportunities in education and employment more advanced, the previously marginalized segments of the population, such as the poor, the LGBT (Lesbian, Transsexual, Bisexual, and Gay population), and the racially diverse were added to the structure of the human capital, allowing for more access to remunerated work and social mobility. However, in the recent history of the world, the only visible minorities that

experienced exclusion from education and employment, just like people with disabilities do, are the racial and ethnic minorities. Hence, although several issues discussed below can be applied to other social minority strata or to the entire human capital pool, I will focus on why it is advantageous for populations with special needs and for the society at large, to include the people with disabilities on a wider scale in the general fabric of global human capital.

Portes (1998) notes four negative consequences of social capital: (a) the exclusion of outsiders, (b) excessive claims on group members, (c) restrictions on individual freedom, and (d) “downward leveling norms” (Portes, 1998, as cited in Vermaak, 2009, p. 404). In this sense, special social capital is limited or ignored altogether in larger abled communities or rural communities, which also restrict the rights and individual freedoms of populations with special needs. In the case of the ecodeme with disabilities, the “downward leveling norms” occurred in the form of lowering the expectations for achievement, which lead to the learned helplessness phenomenon (that is, not trying sufficiently to succeed at something when knowing failure is inevitable).

Foucault (2004) talks about improving human capital from a genetic perspective: Where society raises the question of improving its human capital, there will inevitably arise questions about control, screening, and the improvement of individuals’ human capital, related of course to the unions and reproduction that might ensue, whether voluntary or enforced. It is then in terms of constitution, growth and accumulation that genetics poses political problems (p. 234-5 as cited in Dillon & Neal, 2008, p. 119).

Traustadottir (2010) notes that the uneducated or biased members of society still fear that mothers with disabilities will give birth to children with disabilities, although it is scientifically proven that few types of disability are hereditary. However, today, the rule of law and human rights are more enforced than ever before in history and, with the lessons of the eugenic movements learned, we can discard the worries about inherited genetic traits, and instead focus our energy on the prevention of disabilities and diseases that rise from ignorance, discrimination,

and ineffectively managed resources. According to Foucault, the subjectivization of the person (i.e., the self-constitution of the individual, where power is constructed through subjectivity) that empowers the subject to govern and self-govern can take place only if the individuals are necessarily free of constraints (Peters, 2001). These constraints can take various forms, from poverty, to exclusion, to insecurity and blatant discrimination or shame.

Using Foucault's terms, special capital should be added to the already existent biopower and governed by applying at least the same laws that govern the rest of the population, and even laws that would positively discriminate in their favor, such as positive discrimination of the Affirmative Action based on gender, race, color, nationality, and religion (Executive Order 11246, 1965). Thus, the normalization of inclusion would objectify and subjectify special populations by using and increasing their strengths and unique abilities for the purpose of maximization of the global human potential. This would change the status quo to which this ecodeme has been subjected throughout history, not only through direct killing, but also through "every form of indirect murder: the fact of exposing someone to death, increasing risk of death for some people, or, quite simply, political death, expulsion, rejection and so on" (Foucault, 2003, p. 256). Further, Foucault characterizes the killing as an exercise of power and biopolitics:

If genocide is indeed the dream of modern powers, this is not because of a recent return of the ancient right to kill; it is because power is situated and exercised at the level of life, the species, the race, and the large-scale phenomenon of population (Foucault, 1980, p. 104-5).

In his analysis of the Hohfeldian terms power and disability, George Rainbolt (2006) points out that in legal terms, the words 'power' and 'disability' present as opposites. Power is distinct from liberties in the sense that X has the power to appoint someone, but X does not have the liberty to appoint anyone, but only according to the laws in use. Powers are abilities to change a relation into another, while disabilities are defined, then, as inability to change a

relation. An example of a disability, in this sense, is that not all faculty members can decide tenure for another faculty member, i.e., some have a disability of giving tenure. Having these ideas taken out from the legal realm and transferred to the level of society, we can define power as the ability to make changes in society by various means, while a disability refers to a disempowerment. This point was made in the introduction of this manuscript, that people with impairments are rendered disabled by societal circumstances. The reasons for which I advocate this inclusion and for the development of social capital policies based on human rights, include: (a) any addition to human capital would revitalize the workforce by broadening the demographic group; (b) the real perspectives and the diversity that people with disabilities bring to the negotiation table represents a unique source of growth by enlarging world's view of the population with special needs and by refining the constructivist understandings of the world; (c) human lives and human interaction are valuable, we live in a socially interconnected world, today more so than ever before, where the social interaction design is more horizontal than hierarchical, hence, ignoring such a huge segment of the population would almost be impossible or absurd; (d) because disability is such a varied construct, policies related to disability can be unjust, so informed perspectives would contribute to better disability policies, which can potentially benefit all people, since aging is directly correlated with an increase in disability incidence; and (e) the full economic and social benefits extend beyond the market and the social appearances, because human beings are autonomous agents, with predictable and unpredictable actions.

Richard Florida (2009) talks about the fact that we cannot afford to waste human capital if we are looking for future of growth and that openness and diversity matter because there is an amount of creativity in each one of us, regardless of race, gender, abilities, social and economic

status, etc. Anderson and Bowman (1976) as cited in Schultz (1981, p. 47) support the importance of investment in human capital in its entirety since “a dynamic economy can be launched and sustained only through efforts of men at all social levels who embody both conventional learning and technical-manipulative skills”, to which I would add the importance of investing in men and women of all abilities.

Given the collective grounds and benefits of special capital, a significant public (government) participation is needed in laying the foundations of the quality of special capital, including health, education, and housing. Elements of social capital are already incorporated in public policies that pertain to public well-being, but not enough is done for the people with disabilities cross countries. Expanding from Salamon (1991), the rationale for government involvement in special capital includes: (a) the mobility of labor decreases the willingness of private employers to invest in human capital; (b) the type of training chosen by the individuals is not always well informed and coordinated with their skills, hence the need to advocate for an ecological approach to education; (c) certain population strata lack the means to invest themselves in education, including lacking access to credit to cover for educational expenses; (e) there is some guarantee, but not enough, for private sources, that the skills acquired are going to be used for production; (f) without government involvement, the investment is less likely to be approached on a wide scale and it is more likely to be distributed inequitably; and, lastly, (g) there are benefits that pertain to the society as a whole, visible in their life and consumer’s choices, voting and citizenry behaviors, etc., in a word, the overall the quality of life of the entire nation. As an addition to these arguments, Shultz (1981) mentions that in traditional societies, government policies are more likely to motivate the human capital to acquire skills that depart from tradition. Additionally, there is an entire literature on the benefits of diversity in economic,

educational, and institutional settings, in an attempt to build an inclusive diversity culture “based on (...) founding principles of reciprocal understanding, standpoint plurality and mutual enabling, trust, and integrity” (Pless & Maak, 2004, p. 129).

In the following subsections, using a neoliberal approach where economic efficiency is emphasized, I will show several ways in which people with disabilities can make use of the economic resources provided to them, primarily investment in their education, but also how they can become sources of economic production. Similarly, but using human development and human rights approaches, I will describe several ways in which people with disabilities can benefit from the social and cultural environment and also how they can become sources of social and cultural capital.

**The economic special capital.** The economic special capital is the command over the sum of assets and wealth that people of disabilities possess. Examples of wealth include items that a person owns, such as a house or car, while assets are possessions that have potential value in an exchange situation. Skills are such assets that can be built throughout one lifetime through education and vocational training, but they become economic assets only under the condition of an exchange for remuneration.

If we start from the premise that human beings are income producers, not only in terms of their number or quantity, but also in terms of the quality of their skills, and that human capital is the economic catalyst that provides usable goods and services, we realize that the inexhaustibility of global pool of human capabilities secures continuous limitless economic growth. The quality and quantity of the human capital depend on birth rates and on the superiority of the economic human capital, which, in turn, are heavily dependent on economic, social, and physical environmental contexts. Poverty is pervasive in our world: almost half of the world (over three

billion people) are already on less than 2.50 dollars a day; one in three people are living on less than 2.00 dollars a day; and one in three people are living on less than 1.00 dollar a day (Global Issues, 2009). Usually, the number of births increases proportionally with the increase in income, in early agricultural stages of a country, and decreases with the onset of industrialization and urbanization, with the exception of the 'baby boom' generation (Carnevale, 1983). As the year 2008 was the first year when half of people of the world live in cities (UN Department of Public Information, 2008), in time, a decrease in births will be registered. It is foreseen that the world population will rise to 9 billion until 2050 and then it will reach a standstill or will know very little growth, with a growing aging population (UN Population Division, 2008). Hence, the workers, and not the natural resources, are more likely to become scarce (see also Carnevale, 1983), and there is a high probability of an increase of people living with disabilities. This humanistic view of human capital opposes the materialistic view, which focuses on material resources as agents of economic growth, predicts Malthusian population crises, and foresees restrictions to an increase in economic systems.

Increasing the stock of health of special capital will increase life expectancy and consequently the returns to investments in the population with special needs. Time is an important dimension in the development of humankind. Theodore W. Schultz, views human time as highly priced "relative to the price of services of material factors and goods", meaning that the economic role of human agents is more valuable than the non-human agents' time (Schultz, 1974, p. S4). The fixed supply of human time is restricted to 24 hours a day of a person's life and becomes a critical factor in considering the human economic behavior. Economic growth rests in the management of human time based on the relative high price of "all labor-intensive goods, including children [fertility], thus leading to a substitution of quality for numbers of children"

(Schultz, 1974, p. S5). This rise in the value of human time is, in large part, the consequence of the formation of new kinds of human capital in response to economic incentives. The most important achievement of modern economic growth is undoubtedly this increase in the stock of human capital (Schultz, 1981). Thus, the addition of special capital would bring many benefits to economic growth due to the vast array of jobs the people with disabilities can perform, and what this addition in the workforce would mean for people with disabilities themselves.

Investments in special human capital cannot be considered in a vacuum, first because they rely on the supply side of the labor market and secondly because their value depends on the demand side. In other words, the quantity and quality of the special capital depends on predictions on the number of people with disabilities that can join the work force and on the value attributed to their work. Special capital, however, as part of human capital, is a consumption good, has a value in itself, and does not rely entirely on market supply and demand (Salamon, 1991). The UN organization, which facilitates international cooperation in several areas including economic development and human rights, finds full inclusion of special populations in the human capital as paramount for future global development:

The International Development Strategy for the Third United Nations Development Decade states that particular efforts should be made to integrate the disabled in the development process and that effective measures for prevention, rehabilitation and equalization of opportunities are therefore essential. Positive action to this end would be part of the more general effort to mobilize all human capital for development. Changes in the international economic order will have to go hand in hand with domestic changes aimed at achieving full participation by disadvantaged population groups (UN Enable, 2009).

The new international economic order refers to a set of preferential agreements that would benefit developing countries, replacing the Breton Woods system. These new terms of trade and development would increase in efficiency production achieved through economies of scale. By

including people with disabilities to the pool of human capital, the size and usage levels of economies increase, resulting in larger outputs and a reduction in the cost of a unit.

Global economic development is undergoing parallel phases of intensification of rationalization and of transformation from rationalization to a new economic order.

Rationalization is “the process by which high-skilled, high technology intensive production concentrates in developed countries, and, correspondingly, lesser-skilled, technology-poor production concentrates in lesser developed nations” (Carnevale, 1983, p. 32). The new world order is described by the UN as “the transfer of resources and technology from developed to developing countries” (UN Enable, 2009). As rationalization intensifies, there is a higher demand of rapid retraining and higher skills (technology-related especially), which ultimately determines the competitive advantage of a nation or a business. On the other hand, the process of transfer of capital and technology to developing countries may shift or modify the types of competitive advantage among nations to allow greater participation and more benefits for developing countries. This new economic order will also increase the necessity and rate for retraining for higher-order skills, especially in countries in need of development, which also lends support for the idea of creating policies for all people, rather than just focusing on disability policy specifically.

If an inclusion of people with disabilities in the wide schema of workforce will enhance population growth, then we’ll witness an intensification of labor and social infrastructure, particularly in education and training, transportation and communication, all contributing substantially to a nation’s economic growth. Production and consumption will increase, which, in turn, will demand for more specialization in both capital and labor, contributing to the living standards of all people in the country. This high specialization will be possible only through

education, training and re-training, especially training associated with technology, contributing to an increase in competitive advantage of each country, contributing to the elevation from poverty of countries (that is, the new economic order) that have their population as a main source of competitive advantage. “Finally, mass production expands the workforce in individual firms, creating sufficient class sizes for a cost effective in-house training and human resources development” (Carnevale, 1983, p. 46), i.e., increased demands in preparation of special capital will justify the costs of training and will attract increased productivity. In general, improvements in nutrition, health, housing, education, and in the broadly defined quality of life of people with disabilities are all imperative and all contribute to an increase in the quality and quantity of special capital, and provide an opportunity for economic and social entrepreneurship.

Husz (1998) argues that in order to keep up with the increasing stock of human capital, it is important not to lose touch with the growing economy and job skill demands, and because a highly developed economy uses more complex production technologies, more and more education will be needed in the future. New generations of special capital need to learn more in order to keep up with the existing productivity developments and new technologies. To keep growth constant, investments in education, as a choice of resource allocation since it is considered a substitute for savings, are paramount. Similarly, Carnevale (1983) also supports the idea that higher qualification and specialization of work lead to an increase in productivity. Therefore, the simple inclusion of persons with disabilities in the pool of working human capital will not provide maximum benefits without training and specialization. Unlike physical capital, special and human capital cannot be owned by someone else; it is non-transferable because it pertains to acquired knowledge, experience or skills.

Schultz (1981), a Nobel Prize winner in economics in 1979, notes that in economics, “the ability to perceive, interpret, and respond to new events in a context of risk is an important part of the human capital of these countries” and is treated as the “entrepreneurial ability” of the population (p. 25). The ability to reallocate resources in response to novel phenomena also characterizes “people who supply labor services for hire or who are self-employed” (p. 25), and the governments are slow to take action towards this end, due to consensus and nation-wide valued priorities. Further, Schultz explains that entrepreneurship is an opportunity to take advantage of a perceived ‘disequilibrium’ in the market (1975). In a growing economy, the value of the competency of reallocating resources in response to first-encountered events, and hence deal with disequilibria, is omnipresent. In such economies, “the supply curve of entrepreneurial ability [is] shifting to the right” (p. 26), that is, the ability to adapt becomes more permeant. In these terms, in a growing economy, special capital has economic entrepreneurial potential on multiple levels: (a) they are at least as likely as average people to supply work for hire; (b) they are at least as likely as average people to be self-employed because they are reallocating their services in return to changes in the market demands (for example, to accommodate their mobility or communication characteristics to the market demands); and (c) they are creating consumption opportunities for time and services allocation in unique ways.

While general human capital is expected to contribute to economic and social growth, so should special capital be seen as a development agent, expected to advance strategies for development, contribute to production growth, and entrepreneurial evolution. The fact that women in developed and industrialized countries had more access to and decided to undertake paid jobs had a negative effect on fertility rates and a positive effect on high life expectancies. Thus, in many developed countries, there is an increase in retirements, a decline in fertility rates,

and an increased pressure on the social security systems, unsupported by enough working force. Due to population ageing, the labor force is decreasing while the welfare dependency is increasing. Alongside with other vulnerable groups who did not previously have wide access to the labor market, people with disabilities constitute a great potential for expanding the labor market (e.g., Commission of the European Communities, 2007). On the other hand, the market for accessible products is growing and is becoming a driver for innovation and new legislation will create new services that will, in turn, employ more people.

A change in people's attitudes towards people with disabilities is imperative. Currently, they are marginalized and not given agency in their own matters, but they should be trusted to become productive and independent. For example, people with mental disabilities are empirically shown to be able to work and be productive when they are provided with mental health interventions (pharmaceutical, psychological, and behavioral training). People with physical disabilities, deafness, and blindness are also known to obtain and maintain a job, when provided with reasonable accommodations, can be successful in school and become productive citizens. Due to a great variation in the characteristics of disability, people with certain limitations in their abilities can perform a vast array of skilled and unskilled jobs, especially upon rehabilitation and retraining.

Looking into the future, Carnevale (1983) notes that if economic progress is targeted, there will be a continuously growing necessity for human capital and high skill requirements. In a post-industrial society, agriculture and industry will not disappear, but human capital will find its place in highly skilled jobs and in innovation and creation of new means of productivity and new products. Alternative forms of education, such as open education and online education will play an increasingly large role in facilitating new ways for people with disabilities to create

social, cultural, and economic capital and fulfill their roles as duty-bearers, but also empower them to make claims in defending their rights.

Carnevale says that the competitive advantage of a country rests with its ability to adapt, to apply the newest technologies in production, and to synchronize human skills with the new technologies. Similarly, individuals with disabilities each have their own comparative advantage at performing certain types of work or be the source of employment for other skilled people, such as nurses and educators. Different potentials should be used in different ways for the ultimate purposes of individual and community development, and national growth. Taking advantage of what they have to offer many times parallels if not surpasses the benefits of employing individuals without disabilities, especially because in the case of special capital, the decisions in regards to the jobs they can attain is more likely to be informed by the longitudinal information gathered since the eligibility for services was determined so their skills are more likely to be matched with the type of job they can do, and because, in many cases, they received intensive and longer specialized training to perform certain tasks. Thus, even in the case of special capital, skill compensation leads to complementary actions at a larger scale and encourages competitiveness through “innovation and adoption of new technologies and forms of organization” (Lio & Liu, 2008, p. 504). Messinis and Ahmed (2008) remind us that the skill development facilitate innovation and technology diffusion, through the ‘absorptive capacity’ of the workers, in the development of which education plays a catalyst role. In their analysis, Messinis and Ahmed show that countries with an intense international scientific collaboration utilize their human capital more successfully towards domestic innovation and towards the adoption of foreign technology.

In the context in which the population growth will continue at least until 2050, the surface of arable land will decrease and the danger of desertification will increase due to climate change, humankind has to devise alternate ways for clean and environmental-friendly production based on innovation and entrepreneurialism. The increasing awareness of the need to subdue and conserve natural capital should be an incentive for adding to the human capital all the resources available. The need for research, innovation, and creativity in looking for ways to attain sustainable development are the drives for the production, distribution, and the use of knowledge, the processes of knowledge and creative economies.

**The socio-cultural special capital.** To recapitulate, the special social capital is defined as the resources and support that people with disabilities find in their group membership, relationships, and networks (from family to community), while cultural special capital refers to forms of knowledge, skills, level of education, and attitudes that people with disabilities possess. Special socio-cultural capital facilitates the civil engagement of people with unique abilities. Economic development is positively correlated with modifications in social development, such as an increase in number and shifts in social stratification of populations, as well as adjustments in means of production, human support infrastructure, and human interrelations. Theodore Schultz (1981), as cited in Salamon (1991, p. 4) argues that “the decisive factors (of production) are the improvement in population quality and advances in knowledge (...). Increases in the acquired abilities of people throughout the world and advances in useful knowledge hold the key to future economic productivity and to its contributions to human well-being.” Hiroshi Tasaka (2009) talks about the paradox of knowledge society, when information and knowledge lose their inherent values because of increased accessibility, but, instead, wisdom and collective

intelligence become important. Neither of these elements can be taught by textbooks, but they can be achieved through the common effort of the society and the applied collective values.

A Harvard economist, Harvey Liebenstein (1976) was the first to demonstrate with data that there is an unquantifiable human “factor x”, rooted in motivational and cultural differences, that is responsible for up to 50% productivity differences among workers. Carnevale (1983) argues that in the effort to measure human quality and its impact on economic systems, we need to look at multiple factors, and not just at the correlation between additional school years and wages to measure returns to education. (This is an incentive to look at the attitudes towards disabilities and how they need to change to allow for a greater recognition of the ecological factors that influence outcomes for people with disabilities.) In his opinion, human ingenuity, interpersonal skills, the social utility of innovation and entrepreneurship are important human contributions to the creation and satisfying of human needs and wants. Indeed, as it was shown historically, the human value systems are the ones that guide progress. Bourdieu also argued that culture not only reflects a particular class, but also potentially adds to the wealth of an individual, guiding his or her future lifestyle. Zabala (as cited in Carnevale, 1983), concluded in his study that a 10% increase in worker satisfaction may result in a 1% increase in production. This motivational factor came to be named in economics the “x-efficiency” factor (Carnevale, 1983, p. 48). By including special capital in the labor force, the sense of empowerment and psychosocial characteristics will have a lot to gain, which, in turn, will increase worker’s motivation to produce and consume more.

According to some economists, entrepreneurship is a means of self-expression as people move up the hierarchy of Maslow’s human needs. Carnevale (1983) notes that work effort correlates positively with education, training, and health investment in individuals, hence “work

effort and entrepreneurial urge are an expression of the quantity and quality of human investment” (p. 27). More often than not, entrepreneurial efforts are supported by personal income or loans from friends or relatives (social capital) and not by conventional capital, and several attempts may be needed until success.

Vermaak (2009) uses recent research to pinpoint the difference between “bonding” and “bridging” social capital. Bonding special social capital would mean that populations with special needs would build increased mutual support and will become more active at local levels, while bridging social special capital would increase people’s ability to reach out to groups of people without disabilities and become more tolerant outside their homogeneous group. In most developing countries children with disabilities are provided little support in accessing health services, accessing any form of education, let alone specialized education, and little opportunities to develop their social circles or specialized advocacy organizations. This is even more true for children with severe and profound disabilities, or with roughly new disability diagnoses, such as autism. Depending on their abilities and limitations, people with disabilities can be advised and assisted by groups that specialize in assisting children and adults with disabilities.

Spatial distances – on paper – coincide with social distances. Such is not the case in real space. It is true that one can observe almost everywhere a tendency toward spatial segregation, people who are close together in social space tending to find themselves, by choice or by necessity, close to one another in geographic space; nevertheless, people who are very distant from each other in social space can encounter one another and interact, if only briefly and intermittently, in physical space (Bourdieu, 1987, p. 16).

It is not uncommon for people from distant spatial or social circles to find common ground in either dimension. This common ground can be found in their experiences with disability. The isolationism that people with disabilities are subjected to is harmful not only for their own well-being by denying their right to auto-poiesis (i.e., self-creation, or Arne Naess’ notion of ‘self-

realization'), but for the entire society at large on multiple levels. Bourdieu goes on to explain that these relations or interactions correspond to

the relations between positions occupied within the distributions of the resources which are or may become active, effective (...). [T]hese fundamental powers [resources] are economic capital (in its different forms), cultural capital, social capital, and symbolic capital, which is the form that the various species of capital assume when they are perceived and recognized as legitimate (Bourdieu, 1987, p. 17).

It becomes clear that the group of people with disabilities is situated at the low receiving end of the distribution of resources and, hence, have a low chance of developing the fundamental powers that lead to a better quality of life. Their visibility alone and the increased social space, to which the actual formation and transformation of the self is added, will pull them out from the Saidian category of the 'Other'. This will have a snowballing effect on society's attitudes and exclusionary-inclusionary policies, and on the self-esteem of people with disabilities. Provision of education allows parents, especially mothers, with disabilities to become better caregivers for their children and also to become active agents in their own lives and communities. Thus, people with disabilities can become models and support systems for others.

As entrepreneurs of the self, the process of self-discovery and autopoiesis (i.e., self-creation or self-making) is much more complex for people with disabilities because the number of variables their body and psychic cope with at one time is greater than a person's without disabilities, and because a change on the outside usually means more changes inside and hence more growth. Special populations are likely to develop a great flexibility in relation to their past selves (by self-comparison) due to the greater need to constantly adapt. They have a high willingness to take risks rooted in the desire to be part of the 'norm', and strive to attain a degree of responsabilization of themselves and self-governmentality about their way of life. These traits transform people affected by disability into active agents, which provide great psychological potential for innovative ideas and creativity.

If we think about where most inventions are stemming from, we can take into account that the need of functionality in our lives, the need to adapt to a constant lack of time and to exhaustion, and the need for more productivity played a great role. For example, if a person needs to be more mobile, there is a necessity to meet that particular need and invent or improve moving devices. Throughout history, people with disabilities provided the humankind with all sorts of puzzles, from the simplest such as the need to become mobile, to more advanced and most complicated, such as the need to communicate (e.g., the computer that reads vocal cords). But these inventions did not remain in the use of the individuals who lacked those abilities that the inventions addressed, but extended to benefit all people. One such good example is the automatic transmission for automobiles, created first for people with physical disabilities but put to use extensively for all consumers. People with even significant disabilities have the potential to be as creative as anyone else, but if they have a special need to fulfill, they have an extra incentive to become innovative. Lang (1996), a deaf physicist interested in the history of scientists with disabilities, provides numerous examples of people that made important discoveries and who happened to be affected by some form of disability, such as Stephen Hawking and James Joule the physicists, Charles Steinmetz the electrical engineer who worked on alternating current circuitry, Nicolo Fontana Tartaglia the mathematician known for his solution to cubic equations, Johannes Kepler the astronomer, Gustaf Anders Ekeberg the chemist who discovered Tantalum, James Summer the biochemist who received a Nobel Prize in 1946 for his research in enzyme chemistry, Louis Pasteur the creator of the first vaccine for rabies, and the list could go on.

## Chapter 5

### **Interpretive Methodology Results - The Importance of Evaluating the UN World Programme of Action Concerning People with Disabilities from Multiple Perspectives: An Example of Why and How to Monitor and Evaluate Educational Human Rights Outcomes and Processes**

The UN World Programme of Action Concerning Disabled Persons (UN PACDP) (UN Enable, 2009) was adopted by the General Assembly resolution 37/52 of 3 December 1982 and it is a global strategy to enhance disability equalization of opportunities, which empowers persons with disabilities to full participation in social life and economic development. The UN PACDP also emphasizes a human rights perspective for disabilities. The report analyzes principles, concepts and definitions concerning disabilities as well as a brief overview of the global situation of these persons. It also makes policy recommendations for action at the national, regional and international levels. Equalization of opportunities is described as a pre-requisite for subsequent achievements of full participation of people with disabilities in social and economic contexts. An important principle underlying is that persons with disabilities should be treated within the context of standard community services instead of be considered in isolation.

First, I discuss the reasons for which such a global set of guidelines, such as the UN PACDP, should be amenable to evaluation. Next, I write about why it is important to consider the inclusion of two more perspectives, namely the evaluation for learning, education, and use, and evaluation for public good and democratic principles, when we consider the evaluation of this program, where we discuss the tenets of these perspectives. Then, I consider the benefits of each for the targeted UN program and conclude. Since international and global evaluations are relatively new to the evaluation field, and a comprehensive evaluation of the UN PACDP was not performed as of yet, providing alternative approaches in the evaluation of the program. This study is intended for a broad audience, including evaluation theorists and practitioners, disability

advocate groups, staff affiliated with the UN (specifically UN Enable), government officials, international (including NGOs) and national program managers and staff, civil society at large, as well as various researchers interested in issues of democratization, disability, human rights, education, and their impact on international and national policy.

### **Why evaluate the UN PACDP?**

In their “Report of the United Nations Expert Group Meeting on Disability Sensitive Evaluation and Monitoring”, Avar, Arias, Gebreselassie, et. al. (2002) identified 12 different areas, such as accessibility, education, employment, income maintenance and social security, family life and personal integrity, culture, recreation and sports and religion. The report states that all of the target areas should be monitored to evaluate progress towards the implementation of the UN PACDP. Access is the pre-requisite for education and employment, but once these areas are achieved for all, then social and economic development will occur. These recommendations provide a unified approach towards monitoring and evaluation. By focusing on monitoring functioning and access, the Expert Group believed that resources can be brought to achieve progress towards all the goals of the UN PACDP.

One year later, a member of the previous expert meeting, Dr. Scott Campbell Brown (2003-04), performed a different and more systematic evaluation of the progress and monitorization system of the UN PACDP between the years of 1993 and 1997, i.e., since the third quinquennial review and appraisal of the Programme. The report is divided into a total of six sections, but with three main content subsections, including “Trends in Policies and Programmes from the Disability Perspective; Options for Improving Programme Implementation Monitoring; and Development of ‘Global Disability Indicators’”. The report firstly focuses on progress and obstacles towards the World Programme, and secondly on ways

of improving the implementation of monitoring of the Programme. This report bases its evaluation on a historical perspective, on conceptual matters such as the mainstreaming of disability issues into general policies and disability definitions, and on the use of data and indicators as well as the “use of case studies of effective analytical approaches” (Campbell Brown, 2003-04). The UN PACDP recommends periodic evaluations, using data-driven baselines and indicators. However, such an approach has not been institutionalized in a formal way at the international level. The author uses some countries as case studies to develop some indicators in different fields. For example, in the field of education, potential indicators are the percentage of persons with some education and of attendance at a regular school.

Because these evaluations are intended to be completely objective, not being focused on any specific genre, but appearing to be a-paradigmatic or driven by practice rather than theory, and because these reports seem to emphasize evaluation for accountability and evaluation for macro-policy making, and in the same time not denying the legitimacy of the results-based evaluations, we intend to add to the discourse of the meta global evaluation of the UN PACDP several other factors, while focusing primarily on the theme of education. These components of evaluation are consistent with two genres, namely, the evaluation for learning, education, and use, and add a discussion of evaluation for public good and democratization principles, which would contribute to a greater extent to the development and refinement of the UN PACDP values in the context of an international program evaluation framework. Many of the concepts and policies discussed in the two reports (such as rehabilitation, mainstreaming, and equalization of opportunity) are obsolete, in the sense that the case for these trends was made years before, and in need for a reconceptualization and recontextualization to today’s reality and focus on concepts like equity, empowerment, social enterprise, inclusive development, and building special capital.

Discussions pertaining to the sociology, philosophy, and globalization of culture and education, that are relevant to the current context of disability, human rights, and education were not discussed in depth in these reports.

As with other evaluations, an evaluation of the UN PACDP will: (a) assist evaluators and policy-makers to identify issues early for later prevention; (b) build country confidence about participating in global development; (c) prioritize social and political agendas related to disability rights; and (d) make recommendations improvements for the future (IAR, 2007).

Further, as evaluation is in effect applied research, I believe that opening the environ of the disability and education rights discourses increases its permeability and versatility, taking the discussion to the level of active and interdisciplinary dialogue, which will increasingly engage more researchers and practitioners than ever before.

### **Why Add Two New Approaches to Evaluating the UN PACDP?**

Historically, around the 1990's, the field of evaluation shifted its objectives from individual projects to more comprehensive country-level programs, since more emphasis began to be placed on building human capital and developing institutional arrangements especially in developing countries. As trends in development are increasingly stressing the importance of poverty reduction, active participation, and international collaboration, evaluations are used for sector-wide, country and global level programs (IPDET, 2007). Today, the purpose of evaluation became truly global, as Eleanor Chelimsky (2004) puts it, evaluation

takes a global perspective, extending evaluation's context in the new century to worldwide challenges rather than domestic ones: new technologies, demographic imbalances across nations, environmental protection, sustainable development, terrorism, human rights, and other issues that extend beyond one program or even one country (p.11).

This tendency also becomes obvious upon a consideration of the growth of professional evaluation associations.

The UN PACDP is an international and, therefore, a comprehensive and complex set of guidelines or values. Limiting its evaluation to a results-based approach and mentions to macro-policy elements is insufficient for meeting the needs of the ecodeme with disabilities. Hence, an addition to the existing research and discourse is necessary for an inclusive discussion of social, political, and economic factors, within the borders of meta-evaluation, that govern the international policy medium. Chelimsky writes about the inherent political factors of the evaluation profession, either by dealing with highly political environments or by treating themes that are themselves highly politicized (Chelimsky & Shadish, 1997), such as is the case of disability rights. Given that the traditional approaches or directions in evaluation are geared more towards national or program-specific evaluations, an international program like the UN PACDP calls for the input of multiple perspectives, such as the two approaches we will discuss in this study, evaluation for education, learning, and use, and evaluation for public good and democratization principles. Other possible paradigms can be employed, such as evaluation for contextual understanding, but this will not make the object of my argumentation.

The UN PACDP has built in recommendations for evaluations every five years, which were reported to have been performed by UN staff but were not made public yet. I believe that an evaluation of the UN PACDP can be approached both from formative and summative perspectives. Summative evaluations should be considered at the end of the each five year periods, beginning with 1983, but formative evaluations are welcomed at any point in time, especially if important world events take place. In a way, because the world is in continuous development and not in a state of *ceteris paribus*, even the summative evaluations could be considered formative evaluations in rapport to semicentennial evaluations. In this chapter, I not only encourage the judgment of merit or worth of the program through summative evaluations,

and the improvement of the program through formative evaluation, but I also want to promote the generation of knowledge through theory building, generalizations about effectiveness, extrapolation of principles about what works, and synthesis of patterns across regional or national programs (Patton, 1997).

The French Council for Evaluation, Scientific and National Councils for Evaluation (1999) propose four main purposes of an evaluation: (a) a managerial purpose, that assists in a rational financial and human resources distribution for service improvement; (b) a decisional purpose, for judging whether a program or policy should continue, terminate, or reforge; (c) an educative and motivational purpose, that helps “in educating and motivating public agents and their partners by enabling them to understand the processes in which they are engaged and identify themselves with their objectives” (IPDET, 2007, p. 8); and (d) an ethical purpose, that targets reporting “to political leaders and citizens on how a policy has been implemented and the results achieved” (IPDET, 2007, p. 8). The first two purposes were the aim of the two reports mentioned previously, however, the following two purposes are the goal of my chapter, and they seem similar to two other genres we studied during our course: evaluation for learning, education, and use; and evaluation for public good and democratic values.

I draw my discussion from the work of several representative theorists and practitioners, such as Lizanne DeStefano, a practitioner and educator, who commented on her approach to multi-national and global programs; Jennifer Greene about the public good; Robert Stake about the values and roles of evaluators; E. R. House about evaluative values and deliberative democratic evaluation; and Michael Quinn Patton and his ideas of the utilization of evaluations. For each of the proposed typology of evaluation, I plan to follow certain steps in our analysis,

that is, I look at purpose and audience, evaluative knowledge claims, values, methodology, evaluator's role, and uses.

**Evaluation for learning, education, and use.** Because the UN PACDP, in its current presence in the world, prescribes a set of guidelines rather than setting required standards or criteria for disciplinary (diplomatic) action, but which, however, contributes to the policy-making at national and regional levels, I believe that a meta-evaluation of this program within the genre of learning, education, and use would set the stage for national education policy refinement and betterment of capacity building in nation-states. And because it usually takes a longer time from the UN adoption of a guideline to noticing the outcomes in practice at national levels, the evaluation for education, learning and use would aid in a deeper understanding of how the UN values for disability rights are adopted and adapted at a national level. Additionally, this type of evaluation is meant to be used for informing and influencing the running of the program, generalize knowledge for greater society goals, and enlighten the audience about current issues, in other words, this genre of evaluation is used in knowledge development and management. The UN Development Programme spells out that a critical part of an evaluation should be the generation of knowledge:

Evaluations should not be seen as an event but as part of an exercise whereby different stakeholders are able to participate in the continuous process of generating and applying evaluative knowledge. [...]An evaluation framework that generates knowledge, promotes learning and guides action is an important means of capacity development and sustainability of results (UNDP, 2009, p. 127).

In the Avarad et. al. (2002) UN PACDP evaluation report, accessibility is believed to be the precondition for education, which, in turn, is the basis for employment, income maintenance and social security, family life and personal integrity, culture, recreation and sports, and religion. Hence, enhancing human capital is a fundamental solution to one of the underlying issues of disability, the problem of poverty, as well as higher order human goals, such as autopoiesis (i.e.,

self-creation) and happiness. Because this type of evaluation is a “marriage between social research and social action”, it projects the idea that “the better and the more widely the working of social programs are understood, the more rapidly policy will evolve and the more the programs will contribute to a better quality of life” (Cronbach, 1980, p. 2), hence aiming at the problems of society (Weiss, 1999). As evaluation is in effect a form of social practice, and evaluation for learning, education, and use emphasizes dissemination of knowledge and interactions between people or governments and knowledge, our audience will not be only UN officials, but also for government officials, advocacy groups, people with disabilities, and all citizens that would be informed about current issues in disability studies, the development and results of the program, and its implementation.

The evaluative inquiry focused on education, learning, and use tries to understand the social world making use of knowable factors from the environment, acknowledges that human phenomena are complex, dynamic, and contextual, and believes that knowledge about the social reality is attainable at least to a certain extent. Consequently, social knowledge is incomplete, dynamic, dependent on context, and temporary, while evaluation knowledge is politicized and loaded with intrinsic values.

As a Foucauldian technology of power (Foucault, 1976), biopower, or the management of human capital, becomes the focus of the evaluation for learning, education, and use, in which the pluralistic accommodation of education and evaluation truly represents a novel way of concentrating power. In this pluralistic slant, the evaluation is directed by the user, for the user, and the evaluator facilitates the judging and the decision-making. Policy openness, transparency, accessibility, utilitarianism, and instrumentalism are values promoted by this kind of evaluation. These values are consistent with many of the values promoted by the UN PACDP, namely

accessibility, equalization of opportunities, education as a corner stone to other life accomplishments, empowerment, inclusiveness and participation in the educational process.

Because it adds to the global stock of knowledge, this type of evaluation can be used to enlighten the audience, influence program shaping and continuity, to assist in understanding events and processes for guiding future UN PACDP guidelines and activities that support negotiations in future policy progress. For example, for nation-states, the evaluation for education, learning, and use is useful in helping them to understand how to adapt the UN PACDP values to their values, while inquiring and learning about their own values in rapport to international standards.

In this context, the role of the evaluator is the role of the evaluator should not only be an objective and distanced judge of information, generating knowledge and making decisions. The evaluator should also be an educator and learner, when he/she seeks to understand and explain the underlying process, mechanisms, and values of the social phenomena at hand. In an evaluation in global context, a newly emerging field as Michael Patton said, the evaluator is expected to be increasingly influenced by international and cross-cultural dialogues as the evaluators share term definitions, describe case examples, and explore innovative approaches as part of a global evaluation community (Patton, 2004). The UN program evaluation can be used to develop program theories that can serve as models for evaluation and developing of other global programs. This kind of program is quite unlike other programs, firstly because the content of the program is very abstract describing guidelines related to disability rights, and secondly because the UN officials can inquire and hold responsible the domestic governments on progress on the program goals through the country rapporteurs. In practice, however, how the country reaches those goals is out of the control of the UN officials. Hence, the processes of how such a

program can affect and change the policy and overall wellbeing of the people with disabilities becomes very interesting to study and contribute to our understanding of the mechanisms applied in different cultural contexts.

**Evaluation for public good and democratization principles.** In this section, we advocate for an emphasis on the public good and *democratic principles*, rather than on *democracy* as a political form of government, since not all world countries are or desire to be democratic. However, we assume that all nations hope for a better quality of life and further development and it is more practical to advocate for developing and implementing of certain values and principles that are consistent with democracy and egalitarianism. Stemming from economic theories, public good can take many forms, but has two constant characteristics: (a) nonexcludability, when availability to one consumer means availability for all; and (b) nonrivalry, when consumption by one person does not reduce the amount available to others. Paralleling the views of welfare economy, where public economic good takes the form of national defense, air, sunlight, property rights, peace and security, in sociological theories that promote the basic well-being of people, we believe that public social good can take the form of knowledge and education, human rights, inclusiveness, equity and equality, social justice, emancipation, etc.

I identify education, disability prevention, and rights of people with disabilities as public goods that would benefit directly the ecodev with disabilities and indirectly the entire human society. These values can be achieved through democratic principles by giving voice to the disempowered via regulatory quality, i.e., developing and implementing policies, and by providing stability as a medium for emancipation and progress. On December 02, 2009, the UN High Commissioner for Human Rights, Navi Pillay, reaffirmed the importance of providing

education and empowering the persons with disabilities: “Unless persons with disabilities are brought into the development mainstream, it will be impossible to cut poverty in half by 2015 or to give every girl and boy the chance to achieve a primary education” (AFP, 2009).

The World Bank made public in 2003 four critical foci for global programs, where providing global public goods stands as a priority, followed by supporting international advocacy, coordinating multi-country programs, and mobilization of resources (OED, 2004). The first two criteria, of providing public goods and facilitate advocacy, pertain to the type of evaluation we currently discuss, which shows the importance of these factors in a global discourse, superseding the concern of smaller-scale programs and, consequently, evaluations.

Evaluating for democratic principles is, first of all, participatory, so its purpose rests in “reallocating power in the production of knowledge” (Cousins, Whitmore, 1998, p. 5) and in a close collaboration between the evaluator or researcher that has the expert knowledge and the communities, individuals, or parties who are the beneficiaries of the program, who, in turn, have the experience and opinions. The stakeholders’ participation in the evaluation is enhancing the evaluation relevance and ownership, and thus its utilization, having tremendous potential to become a transformative participatory evaluation, that is, evaluation that appeals to participatory principles and actions to democratize social change. Further, Cousins and Whitmore (1998) note that, in transformative evaluation for advancement of democratic values,

[m]ost fundamental is the issue of who creates and controls the production of knowledge. One important aim of transformative participatory evaluation is to empower people through participation in the process of constructing and respecting their own knowledge (based on Freire’s notion of “conscientization”) and through their understanding of the connections among knowledge, power, and control. (...) [Participatory] evaluation is conceived as a developmental process where, through the involvement of less powerful stakeholders in investigation, reflection, negotiation, decision making, and knowledge creations, individual participants and power dynamics in the social-cultural milieu are changed (p. 9).

In a participatory evaluation, the knowledge is geared towards understanding, clarification, and articulation of values through a process of consensus. By making the stage available for all voices to be heard, the values are appreciated both in the context of commonality and in the context of individuality. In this context, both public and subjective preferences are taken into account, allowing us “to count each person rather than each dollar equally” (MacRae, 1985, p. 188). Hence, in this pluralistic model of evaluation, both subjective wellbeing and collective wellbeing are targeted. “If societies become more authoritarian (...) evaluation could be used for repressive purposes. On the other hand, if market societies become less ideological, then evaluation could become more useful” (House, p. vii).

In the evaluation for democracy, where the common and public good is targeted, the evaluator can achieve objectivity through multiple subjectivities, but always employ public and democratic criteria. The social world is seen as being composed by individuals, and each of their voices and perspectives is taken into account, with the assumption that “the world is us”. Like the evaluation for learning, education, and use, the evaluation for democratization presume that philosophical assumptions serve us in better understanding the goals of the program, and they matter in the context of democratic values and the good of the people, for the effective practice of useful evaluation. What is more important to guiding human understanding are the meanings that are extracted from individuals, groups, and nations and how to corroborate these understandings for the benefit of all. The social knowledge in this context is attainable. The evaluator is required to “incorporate the view of insiders and outsiders, give voice to the marginal and excluded, employ reasoned criteria in extended deliberation, and engage in dialogical interaction with significant audiences and stakeholders in the evaluation” (House & Howe, 1999, p. XIX).

Deliberation is the paramount of evaluation for democracy and public good. The CRPD was initially signed by 82 states and ratified by 1, the highest number of signatories in the history of a UN treaty, after the Convention for the rights of the Child. Subsequently, the CRPD was signed and ratified by 72 countries in less than two years. The fact that there are 14 declarations and reservations and 4 objections to these guidelines, means that each country that ratified the treaty has undergone a process of debating upon what is implementable in their country, and some countries adapted the content of the guidelines before adopting into national rules or policies. The ratification of a convention is a two level political game, the first level is occurring nationally, i.e., the process of adapting before adopting, and the second level of deliberation is occurring internationally.

Stake sets out two important roles the evaluator fulfills for the judgment and remediation, one of the roles of the evaluator is “as finder and reporter of program quality, the other the preservation of quality and restorations to quality” (2004, p. 105). According to House and Howe (1999), “evaluators have a fiduciary responsibility to participants in evaluations and to the public to use their expertise to further the public interest. Sometimes they must be savvy negotiators, willing to engage in compromise, but they must also place limits on how far compromise can go and be uncompromising about morally objectionable claims. Evaluators must take stands on the requirements of democracy” (p. xxi). Given all these factors, this type of evaluation is used for social betterment, fostering of deliberative democracy, and promotion of dialogue among key stakeholders. Promoting disability rights is a step forward towards progress, advancement of human values, and, in the long run, ecological sustainable development through encouraging human enterprise, creativity, and collaboration.

## Discussion

Although the macro-policy and performance-based types of evaluations yielded important results in previous UN PACDP reports, and although evaluators can also use contextual understanding and inclusive evaluation (as described by Mertens, 1999), my targets in this chapter are the evaluations for education, learning, and use, and for public good, social wellbeing, and democratic values. Our purpose was to improve quality of the global evaluation discourse, identify underdeveloped issues, to objectify or subjectify topics for the benefit of policies for people with disabilities, and to envision the future in a clear manner (Pollitt, 1993), most goals pertaining to the UN PACDP that targets the global ecodeme with disabilities.

Education is the basis of other superstructures that have as a consequence the development of public good (Avard et. al., 2002). An increase in public good(s) results in the increase in the quality of life of the whole society, which is mainly achieved through an increase in the quality of human capital. Capacity building is always achieved through education and training, and opens the doors for entrepreneurship and creativity. This logistic model is supported also by the World Bank Operations Evaluation Department (OED, 2004) that states that “global programs should support global public goods whose externalities cut across many countries” and

may be best organized at the sector or thematic level in order to benefit from cross-country knowledge sharing, specialized expertise, economies of scale, and targeted resource mobilization. The activities and objectives of a global program should be assessed for the benefit to developing countries and value in leading to poverty reduction, and different approaches to ensuring global to country linkages are possible (p. 302).

These benchmarks are in accordance with the new international economic order mentioned in the UN PACDP that would benefit developing countries through transfer of resources and technologies and through preferential trade options, which will also impact people with disabilities. A global evaluation should assess a program based on these criteria as well as

program-specific standards. My argument that evaluation for democratic values and public good builds upon the evaluation for education, learning, and use, rather than entering in a competition, is also reinforced by Cronbach (1980), who noted that the mission of evaluation for education is to “facilitate a democratic, pluralistic process by enlightening all the participants” (p. 1), in other words, illumination through knowledge paves the way for empowerment and self-ruling. An inclusive schooling system would provide students with entitlement and empowerment, which are the most important factors that help poor people to rise above poverty (Amartya Sen, the Nobel laureate in economics in 1998, as cited in Gutierrez, 2006), as well as the most important factors that help people with special needs achieve a better life. During an interview I took Dr. Lizanne DeStefano, an experienced international evaluator, she emphasized the importance of participatory evaluation for international programs such as the UN PACDP.

Both the evaluation field and the UN have social structures that allow and encourage internal and interdisciplinary critique and dialogue, and making use of these democratic communication mechanisms would only benefit knowledge, policy, and citizenry; also, both emphasize transparency that be achieved through applying both types of evaluation I advocate for in this chapter. However, my two evaluative inquiries have different approaches to hierarchical structures: the evaluation for learning, education and use is a top-down approach but open for all, while the evaluation for public good and democratic principles is a bottom-up approach that impacts everyone.

A discussion of methodologies is not relevant for my argument because in both evaluative inquiry methods, both quantitative and qualitative methodologies are welcomed according to the targeted context. However, I believe that any chosen methodology should be valid and reliable in itself as well as together when used in a mixed methods design. Country

case studies are welcome in mixed methodology evaluations. Dr. Lizanne DeStefano also advocates for a mixed methods approach whenever possible. A methodological drawback for both evaluative approaches, as with other approaches for this particular international program, is that the evaluator has the challenge of gathering large-scale data about the evaluands and design a large-scale collaboration among different levels of stakeholders, mainly program administrators and related staff.

These two types of evaluation build upon and, in their turn, directly and/or indirectly influence evaluation for policy and macro-decision making and evaluation for accountability or performance, the two types of evaluations previously used in reporting about the UN PACDP. The addition of the two types of evaluations discussed herein, with all their benefits for the discourse of global status of disabilities, will further contribute to policy transfer, the process of ‘learning’ a policy or policies either from another sector or from another country or international organizations. Policy transfer usually leads to policy convergence and is part of the process of globalization (see for example, Answers.com, 2009; or Stone, 2000). My arguments for the addition of the two kinds of evaluation will also contribute to the discourse of knowledge and to the process of policy creep, i.e., research knowledge contributes indirectly by gradually bringing into the discussion the outcomes and changing the perceptions and understandings of disabilities (see for example, ODI, 2009). By opening a global policy dialogue about disability rights evaluation of the UN PACDP, we enter a new zone of hermeneutics of the UN disability policy.

## Chapter 6

### **Interpretive Methodology Results – Programming to Develop the Capacity of People with Disabilities: Developing an Ecology of Disabilities and Ecoducation for People with Disabilities - From an HRBA Approach to an Ecological Approach to Successful Inclusion of People with Disabilities**

Before 1997, the UN based its policies on a Basic-Needs Approach, which established basic requirements of the receivers of services and emphasized service delivery (UNFPA, 2008). The HRBA was an important step forward in improving the quality of life of people with disabilities and no abdication from its principles should occur. What the HRBA called for was an imperative for people with disabilities and without disabilities to be equally valued, and an emphasis on both service delivery and capacity development through empowerment.

In this chapter, I facilitate the understanding of an ecological framework for disabilities and special education, by building upon previous work on the ecology of human development, by developing a historical perspective with nouvelle elements (i.e., main characteristics of the new ecological framework), and by drawing several goals and strategies to assist in its quicker, more thorough, and finer implementation. The ecological approach focuses on bringing together all actors of the society as active participants in development and sustainability to end discrimination, marginalization, and disempowerment. This should be done from both ends of the ability spectrum, not only unidirectional, where people with disabilities are only at the receiving end of services. In the travaux préparatoires precursory to the CRPD final draft, a number of countries have stressed the importance of the terms ‘legal capacity’ and ‘capacity to act’ as equal, and commented that

“Capacity” has two elements: that persons can be the bearers of rights and also the bearers of obligations and responsibilities. States often wish to protect people with regard to the latter. This is done in the case of children and in cases related to consumer protection, for example. Such protection does mean that the full legal capacity of that person is restricted, only that they require protection in certain circumstances (representative of Liechtenstein, Ad Hoc Committee CRPD, 2006, p. 3).

This basically means that the terms ‘legal capacity’ incorporates two elements: the capacity to hold a right and the capacity to act and exercise the right, including the legal capacity to sue. Therefore, ‘legal capacity’ includes features of identity and agency (i.e., empowerment, the 7<sup>th</sup> principle of the HRBA, as outlined by the Kofi Annan’s *Towards a Common Understanding among the UN Agencies*). The interdependence of actions of the duty bearers and the rights holders, displayed in the scheme below, profiled in the human rights model (Fig. 8), is fundamental to the interdependence encapsulated in the ecological model. Emphasizing the rights rather than the needs of people (including people with disabilities), legally and legitimately claimed, wires the interconnectedness of people and agencies in a structurally different manner. Having people with and without disabilities learn, teach, and live together will contribute to the rise of their communities. In other words, the ecological approach holds all people and agencies responsible and entitles them (i.e., every human being and legal entity is recognized as both holder and bearer of rights) to contribute to the elimination of barriers in society, by respecting, protecting, and fulfilling the basic rights. All people are both duty bearers and rights holders and this chapter focuses specifically on the people with disabilities as a subgroup of humankind. This chapter also focuses mostly on developing the theoretical aspects of the ecological framework for disabilities and special education, rather than on the practical aspects of implementation. The issue of removal of barriers has a theoretical start-point, and acknowledges a need for change in mentalities and attitudes, and does not purport to find all the solutions on how to achieve this, although some practical suggestions are made sporadically and used as examples.

The reciprocal relationship  
between rights holders and duty bearers



Figure 8. The Reciprocal Relationship between Rights Holders and Duty Bearers. (Source: UNFPA, 2008. Reproduced with permission.)

The document *Human Rights Based Approach to Development Cooperation: Towards a Common Understanding among the UN Agencies* describes the central factors that should remain constant in the advocacy, delivery, and programming of services when using an HRBA. In addition to (a) the three statements referring to the introduction of the HR approach in all UN agencies, based on the standards derived from all international human rights instruments, and aimed at developing the capacity of all duty-bearers and rights-holders; (b) the basic human rights principles; and (c) the steps to programming specific to the HRBA, the UN common understanding lists other important elements “of good programming practices” that include:

1. People are recognized as key actors in their own development, rather than passive recipients of commodities and services.
2. Participation is both a means and a goal.
3. Strategies are empowering, not disempowering.
4. Both outcomes and processes are monitored and evaluated.
5. Analysis includes all stakeholders.
6. Programmes focus on marginalized, disadvantaged, and excluded groups.
7. The development process is locally owned.

8. Programmes aim to reduce disparity.
9. Both top-down and bottom-up approaches are used in synergy.
10. Situation analysis is used to identify immediate, underlying, and basic causes of development problems.
11. Measurable goals and targets are important in programming.
12. Strategic partnerships are developed and sustained.
13. Programmes support accountability to all stakeholders [UNFPA (Common Understanding [hyperlink](#)), 2008, p. 3].

The key principles enshrined in the human rights norms and standards, and in the HRBA, support an ecological approach to the education of people with disabilities. As shown previously, democracy is a catalyst for the achievement of human rights, and together they (democracy and human rights) constitute ‘building blocks’ for an ecological approach. Scott Long (2000) outlined the interplay among human rights, freedom, and activism:

But rights do not begin at the international level. They begin with local problems and local lives, with individuals who realize their dignity has been injured, and strive to imagine remedies and solutions. The fact that so many of the non-governmental and intergovernmental organizations defending human rights – from Amnesty International to the United Nations – have their headquarters in the North, in London or New York or Geneva, leads many people to believe that rights somehow belong there or flow from there. But the most important place to defend your rights is the place where you actually are. The old cliché is true: freedom, like most good things, begins at home.

Without the freedoms and the stability of democracy, and without the respect for human, and implicitly disability rights, a synergic and stigmeric cooperation of all actors of society would not be possible. “Individuals, the media, civil society and the international community play important roles in holding governments accountable for their obligation to uphold human rights” (UNFPAb, 2008). The continuous correlation and bidirectional shaping among different levels of societal actors urges the emergence of a more comprehensive framework that employs different focal lenses that zoom on the issues of disabilities and education of people with disabilities: the ecological model.

Hafner-Burton and Tsutsui (2007, as cited in Henkin, 2009) concluded in one of their studies that “socialization, persuasion, and learning, if they are taking place over time, are not teaching the right messages to the governments (...); and that, in the few instances where new ways of acting are indeed being learned, leaders are not effectively implementing those ideas to better protect people”. These research conclusions are alarming and call for a fresh model, based on the collective memory on human rights, enshrined in the history of international human rights treaties and conventions. This model would target a change in mentality and attitudes through education and socialization, as well as changes and enforcement of legislation and policies. Under the auspices of the CRPD, the need for a new framework for disabilities is called to the table. In the travaux préparatoires for the CRPD, the UNSCAP (2006) urged State members for international cooperation, adopting a unifying interactionist perspective, based on international human rights provisions:

*Urge* member States to adopt a provision on international cooperation which will be conducive for the realization of the human rights of persons with disabilities and, in particular, assisting developing States in appropriate ways to fulfill their obligations under the Convention. Appropriate measures might include:

- (a) Ensuring that international cooperation, including international development programmes, are inclusive of, and accessible to, persons with disabilities;
- (b) Facilitating and supporting capacity-building, including through the exchange and sharing of information, experiences, training programmes and best practices;
- (c) Facilitating cooperation in research and access to scientific and technical knowledge; and
- (d) Providing, as appropriate, technical and economic assistance, including by facilitating access to and sharing of accessible and assistive technologies, and through the transfer of technologies (p. 1).

The ecological framework should incorporate all essential elements and principles of the HRBA approach, described in the UN developmental cooperation and programming framework, that is, the international human rights standards and principles, essential HRBA elements, and the fundamental components listed above. Recognizing that people with disabilities are

important contributors to society and that allocating resources to their rehabilitation is a human rights issue and a productive investment, I will develop the ecological approach for disabilities and special education. Although this model can be developed and tailored for any marginalized group of people, I will focus mainly on the people with disabilities. (This is also consistent with the way that US education policy is going, with NCLB increasingly bringing special education under the purview of general education policy and accountability, at the same time recognizing there were specific special education issues, but that all students have to be educated and provided the supports needed to be successful.)

In his book on *Hinduism and Human Rights*, Arvind Sharma (2003) pointed out that one does not need to shed the cloak of the old to embrace something new. Sharma explored the change in language from the Universal Declaration of Human Rights (Article 18) referring to “the right to *change* one’s religion” to the language in the ICCPR, almost 20 years later, as “the right to *adopt* a religion” (Sharma, 2003, p. 133). If we translate this language to the situation of this study, adopting the new ecological principles does not recant the human rights model, but it builds on it and shifts to collective human rights. By accepting the new framework and not abandoning the former one, we scaffold upon the advancements that the human rights framework has achieved and we further the change in mentality required for an equitable treatment of all people. Using the legal infrastructure of human rights, the ecological model is theoretically grounded in interdisciplinarity and can readily become rooted in institutions across various levels. Further, referring to religion, Sharma invokes Mahatma Gandhi’s opinion about having “innate respect for other religions as we have for our own. Mind you, not mutual toleration, but equal respect” (Sharma, 2003, p. 100, as cited from Gandhi, 1950, pp. 231-2). Applied to people, we must have respect for the innate value of all human beings, as being unique, and not only

accepting or tolerating them. It follows that human rights should be a required component of any framework that involves the betterment of human beings.

In the following paragraphs, I describe the ecological framework that was integrated into different fields and attempt to develop an ecological framework to disabilities and the education of people with disabilities, starting from the theory of systems, to behavioral, cognitive, and social sciences, and to establishing the meaning of ecoducation and epiducation for people with disabilities. I outline several essential principles of the ecological model and point out the four spheres or spaces of action in which the ecological principles should impact the lives of people with disabilities.

### **The Ecological Framework**

The ecological framework is established in other fields, such as biological sciences, economics, social work, health, psychology, but not in special education as of yet, although some references were made to it, which are discussed in this chapter. Such a framework is not established in the general field of education either. In the field of political ecology, the presence of environmental issues is required. For example, Lisa Gezon (1997) envisions political ecology as a series of “textured analyses of multilevel political interactions and processes, showing their relationship to the regulation of control and use of the biophysical environment” in the case of Ankarana, Madagascar (p. 85); and Derman and Ferguson (2000) also talk about the political ecology of water management. In economic ecology, environmental concerns are also primary, for example the work of Monkombu Sambasivan Swaminathan on sustainable food security (ExpressNews Staff, 2010).

However, when the term ‘ecology’ becomes an adjective, for example in ecological economics, *ecology* evolves into a philosophical framework that transcends both fields and

becomes focused on “the interdependence and coevolution of human economies and natural ecosystems over time and space” (Xepapadeas, 2008). “Ecological economics includes the study of the metabolism of society, that is, the study of the flows of energy and materials that enter and exit the economic system” (Wikipedia, 2010), having at its forefront preoccupations of nature, justice, and time (Faber, 2008). Socioecological psychology is preoccupied about how human thinking and behavior is influenced by environmental factors (Nauert, 2010). Arne Naess’ notion of ecosophy, outlined in 1972 at the Third World Future Research Conference in Bucharest, targets “a philosophy of ecological harmony or equilibrium” (Drengson & Inoue, 1995, p. 8), with characteristics of openness, due to differences in facts, visions, and value priorities, but also targeting “policy wisdom, prescription, not only scientific description and prediction” (p. 8). Felix Guattari’s conception of ecosophy is built on Bateson’s (1987) interdisciplinary ‘ecology of mind’ and emphasizes the interdependence between human and natural environments: “without modifications to the social and material environment, there can be no change in mentalities” (Guattari, 2000, p. 27).

There are several ecological concepts that progressively zoom in from outer space to living organisms. Post-modern cosmology advanced the possibility of multiple universes formed by either random eternal inflationary events (e.g., Andrei Linde in Schomaker, 2003) or cyclic models with periodical collisions of parallel planes in creating new stars and galaxies (Steinhardt & Turok, 2008). Peters (in press) pointed out that if we are to discuss an inclusive view of environment “that decenters Earth within the solar system, then the notion of environment has to be renegotiated as one that dynamically also includes the lifespan of the solar system” (p. 16) and advance environmental ethics when we talk about the intrinsic value of human beings but also of other living systems (Peters, in press). Indeed, the ecological field operates with

principles from the theories of physics and sociology (i.e., natural laws) exemplified above, such as cyclicity and succession, dynamicity, systemic integration, hierarchy, interaction and interdependence, evolution, complexity, adaptation, difference, and diversity, and further develops the following terminology relevant to the ecological framework of disabilities and special education: ecosystem, population, ecodeme, niche, and stigmergy.

The term ecosystem refers to a network of organisms that form a unitary, responsive, and dynamic system. “Some systems develop gradually, steadily becoming more highly integrated and more delicately adjusted in equilibrium. The ecosystems are of this kind, and the normal autogenic succession is a progress towards greater integration and stability” (Tansley, 1935, p. 300). Cullen, Camm, Jenkins, and Mallett (2006) explained the systems theory as follows:

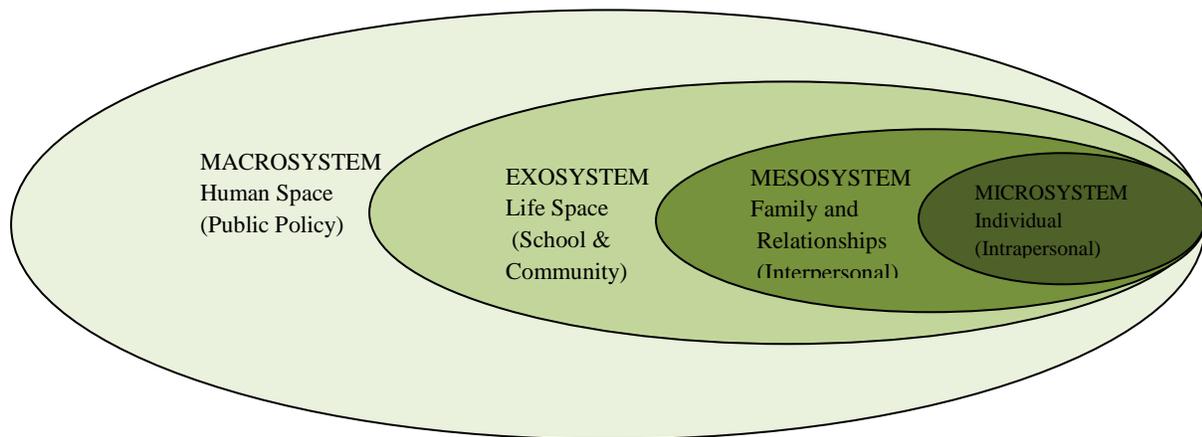
The root meaning of the word “system” is the Greek *synhistanai*, which literally means “to place together.” Understanding things systemically means putting them into context to establish the nature of their relationships. (...).

A key characteristic of the organization of living organisms is the tendency to form multi-leveled structures of systems within systems, referred to as hierarchies. Hierarchy, in this sense, has a different meaning than is typically thought of in organizations; in nature, there is no “above and below” so much as networks within other networks. Connectedness, relationships, and context are fundamental to understanding systems theory. (p. 25)

An ecodeme refers to a stratus of population occupying any specified ecological habitat (Oceanography Dictionary, 2010). In regards to the concept of niche, “the definition introduced by Hutchinson (1957) is particularly widespread and useful: The niche is the set of biotic and abiotic conditions in which a species is able to persist and maintain stable population sizes” (Hutchinson, 1957; Wiens, & Graham, 2005). In socio-ecological behaviorism, the terms niche and ecodeme gain a parallel connotation. “An ecological niche implies both interaction and location. An ecodeme is a population occupying a particular ecological niche” (Kauffman, Lloyd, Hallahan, & Astuto, 1995, p. 329). Social and behavioral scientists are concerned with survival and how the quality of human life of an individual or group is altered by someone’s

occupying a given niche and how humans create and maintain ecodemes and niches for themselves and others. The idea of stigmergy is based on Pierre-Paul Grassé of “social appetite” that a social insect possesses an inherent desire to seek its nestmates (Theraulaz & Bonabeau, 1999), and denotes an indirect communication and coordination between social individuals, where the self-regulation of the individuals and of the labor is regulated by the building itself (hence the root of the term: ‘*ergon*’, which means ‘work’ in Greek; and ‘*stigma*’ meaning ‘stimulus’) (Heylighen, 2007). Similarly, a stigmergic organization within and among the networks corresponding to the levels of ecological model (but especially more so at the individual level fading out towards the macrosystem level, explained in the next paragraph) is applicable for human beings, as complex social and adaptive systems. School systems can also be an example of stigmergic organization, although sometimes difficult to show in practice.

Brofenbrenner (1979) set up a system model for understanding human ecology, starting from the *microsystem* representing the developing child, to the *mesosystem* encapsulating “interpersonal structures in the form of dyads and N+2 systems” (p. 209), the *exosystem* consisting of one or more settings, and to the *macrosystem* referring to cultures and subcultures. “The ecological environment is conceived as a set of nested structures, each inside the next, like a set of Russian dolls” (p. 3; see Fig. 9), in which “environments are not distinguished by reference to linear variables but are analyzed in systems terms” (p. 5), i.e. multi-systemic. The ecological model of disabilities and special education is based on Brofenbrenner’s prototype of human ecology, but it includes a dynamic variable in which freeform-like subsystems interact with all the other subsystems, not only with the one(s) in their proximity (see Fig. 12).



*Figure 9.* Hierarchical levels in the ecological model of disabilities and special education based on Bronfenbrenner’s classical socio-ecological model.

There are several distinct differences between globalization and ecologization.

Globalization refers to the interconnection of markets, people, communication systems, and so on, but does not take into account the whole systemic context of human development, which is included in the process of ecologization. While globalization is seen as a network (see Fig. 10) where goods and information continuously circulate, the ecological model is multi-systemic (networks within networks), unifying “economic profit”, “political dominance”, “desirability of bringing about conformity to values of donor group”, and “ethical and religious considerations” (Bateson, 1987, p. 62) with human actions (see Fig. 11). While globalization adopts a liberal and neo-liberal language, even in the context of cultural globalization where we talk about marketable innovation instead of creativity, about knowledge economy and consumerism, transactional thinking, and individual autonomy (Ong, 2006), ecologization refers to the contextualization of the individual within the multiple-layers of the meso-, exo-, and macro-systems and focuses on development and auto-poiesis.

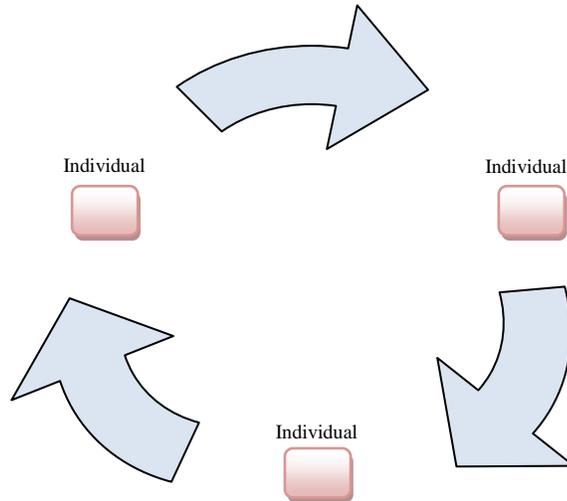


Figure 10. Interconnectedness in globalization theory: the individual is part of the global network, where the circulation of information and goods is the focus.

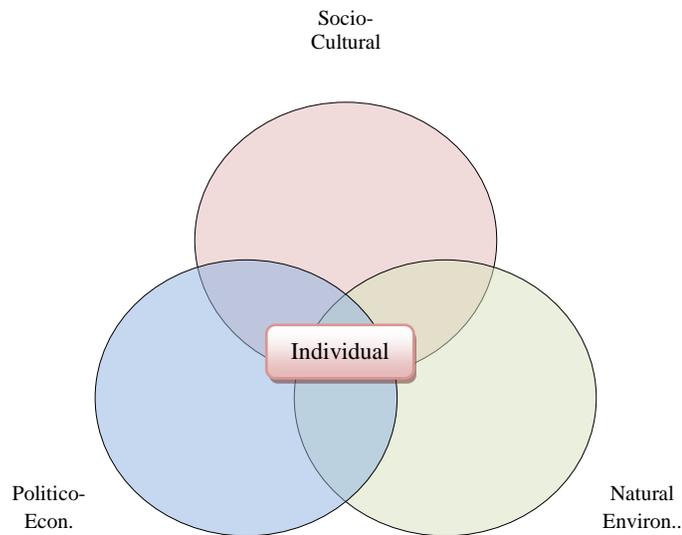


Figure 11. Interconnectedness in the ecologization theory: the individual is placed at the intersection of the surrounding environments, in the context of his connections with the world.

The ecological framework’s “unit of survival is *organism plus environment*” (Bateson, 1987, p. 491). Brofenbrenner (1979) also emphasized the dynamics between the individual and

his settings and surroundings by including in his theory of the ecology of human development Kurt Lewin's equation of personality:  $B = f(PE)$ , describing that one's Behavior is a function of (i.e. depends on) the Person and his/her Environment (Lewin, 1935, p. 73, as cited in Broffebrenner, 1979). Ecologization is also based on consequential thinking, which focuses on the potentiality of one's decisions and their consequences, that is, it takes into consideration the impact that human action has on the surrounding settings (natural, political, economic, and so on). The human and community context, the environmental or natural resources contexts, the institutional context, and the effects or backlashes of the globalization are not taken into consideration in either the globalization theory, or the HRBA models.

Many agree that globalization is not a zero-sum game (for example, Emma Bonino, minister for International Trade and European Affairs of Italy in Bonino, 2010), in which all players have the potential to win. However, in the game of globalization, the bigger winners are those who invest more capital (financial, labor, knowledge, etc.), and hence the developed countries have more chances to pick up the bulk of the benefits, with the developing countries remaining still in a developing stage. For example, creditors, large companies, the highly skilled and educated, the professional and managerial people, the strong, the global markets and culture, and, in general, the North are bigger winners than the debtors, small companies, the people without skills or with impaired abilities, the workers, women and children, and local communities and culture (Streen, 2001). The ecological model is inclusive to all actors, including its surroundings, becoming a strong scaffold for sustainability in the long-run. On the other hand, human rights activists and green ecologists advance noble principles, but these are situated in narrow situational contexts.

An ecological perspective, due to its multi-systemic action, supports the global and the local, as it is based on *difference* (Bateson, 1987). Thus, it would allow action at the roots of the fierce neoliberalism, for example unemployment, power concentration, monopolies, destabilization, inflation, increased relative poverty, and decreased social programs; and at the roots of human rights infringements, such as discrimination and inequity. “Ecology”, Bateson said, “in the widest sense, turns out to be the study of the interaction and survival of ideas and programs (i.e., differences, complexes of differences, etc.) in circuits” (1987, p. 491). The antineoliberalization and antiglobalization movements started to surface several decades ago in protests against governments’ lack of social measures and in the rise of national-developmentalism. An ecological approach would not be based on the quantification, financialization, and marketization of everything, as it does not regard growth as an end, but it takes into account four levels of the ecological hierarchy, as well as the interconnections among them, emphasizing concomitantly the processes of growth and the effects of growth, global networks and local values.

For John Locke, individuals possess natural rights that are claimed independently and that precede the claims of the government or any political community. Natural rights are sufficient to preserve a harmonious society. These individually claimed rights are a fundamental component of liberty, and set limits to the authority of the political society or the State (Walker, 2009). Such a sovereign power would limit human liberty derived from natural rights, since its enforcement of human rights would be limited. Locke argues that self-governance (in a Foucauldian sense) is preferred to a superpower. However, this type of absolute democracy is rarely encountered in today’s societies and perhaps not even practical. This is why Locke talks about a social contract, which would protect the rights to life, liberty, and property and would prevent the

strong to overpower the weak. Under a social contract, the government would have the consent of the governed to act to their benefit. Lockean rights are based on a concept of the individual who is seen as separate and logically prior to society. There is no view of society or community above that of freely contracting individuals. The ecological view challenges this individual atomism substituting a relational view of rights based on a notion of community as ontologically prior. A departure from the Lockean perspective to a relational model compels for a transmutation of mentality from natural and individual rights to the rule of law and group rights; and from political and economic freedom to social and civil freedom. The social contract would still have to be in place though to avoid anarchy. The contextualization of the individual in a multi-systemic world, that is specific to the ecological framework, calls for an emphasis on group rights. For the ecodeme of people with disabilities, this claim is based on the common but unique (and, many times, immutable) characteristics of this population.

I envision the ecological model as a new approach, as a reframing of the HRBA and a critique of the individual human rights characteristics inherent in the HRBA. This urges for a refining of the way in which we talk about disabilities. In the previous chapters, I emphasized how disability becomes such (i.e., a disability) in a socio-cultural context and how disempowerment is derived from the isolation, exclusion, and itemization of single individuals or small groups in the community. However, if the ecodeme with disabilities acquires legal recognition (plus the corresponding enforcement) within the boundaries of state actors, and, hence, it is empowered as such also within their communities, a social recognition of these rights is more probable and the social inclusion will have an increased leverage. It is hoped that the ecological model will eventually replace the HRBA, but will also incorporate it and take its

principles beyond its powerful but presently limited capacities. The main reasons for which the ecological approach calls for a shift in policy and mentalities regarding disabilities include:

- (1) disability, as previously discussed, does not exist in a vacuum, rather this concept is influenced by factors that exist in the reality of the individual at different levels, which policies and laws need to take into consideration comprehensive systemic approach to all areas that pertain to the development of the individual, including the consideration of disabilities and education;
- (2) disability is a more pervasive issue in society than the WHO and World Bank statistics show (i.e., approximately 15% of the population), rather it may affect all people especially due to ageing, thus, moving from the categorization of disabilities (although categorization should remain in place as a justification for service eligibility) to the adoption of a more inclusive definition of disabilities;
- (3) the ecological approach embeds a meta-systemic approach, incorporating multiple layers of influence upon the individual and, thus, moves away from an individual consideration of the person, and looks at people with disabilities as a group. In other words, a jump from a Lockean rights tradition, which singles out the individual from society and prioritizes him or her before the society, to collective human rights for people with disabilities, in line with the CRPD, will boost the potential for empowerment and agency of people with disabilities; and
- (4) the need to rethink the human rights idea that moves from a liberal and neo-liberal approach, where rights are unregulated and disjointed, to a social (perhaps socialist-like) approach, where collective rights are paramount and reflective of an interactionist model.

### **Ecology for People with Disabilities and Planning for Ecoducation**

The idea of human ecology has permeated the behavioral, cognitive, and social sciences for close to a century. Barker and Wright (1949) examined the place of ecology in psychology, as the home or habitat of behavior seen in two general domains: (a) the life-space, or one's personal environment; and (b) the broader physical, geographical, political, social, etc. human conditions. Laycock (1943) considered that the most important phase of any individual's education is to learn to understand others, and to adjust to them and to the Infinite. Ostrom, Martin, and Zacharis (2008) discussed the cosmology of postmodern adult education from a phenomenological point of view, looking at the importance of autopoiesis, i.e. self-creation, of

each individual in order to become a better competitor on the global job-market. Their discussion incorporated elements of human ecology and was similar to the approach described herein.

Peters (in press) talked about ecosophy, green philosophy, ecology, economy of education, and learning as the main human activities that support sustainability. I am building upon these ideas and take a step further in discussing disability issues and special education as a matter of socio-political ecology.

Zachar (2000) applies the distinction between natural or essentialist and practical classifications to disability and psychiatric disorders, concluding that an essentialist label is “scientifically malignant” (p. 169) when used in this context. This type of practical approach is reflected in the recent editions of the Diagnostic and Statistical Manuals of Mental Disorders, where most disability syndromes are described (Oswald & Cautinho, 2007). Particularly important for the ecological model of disabilities and special education was Bateson’s emphasis on *difference*, as an “energy relation” (1987, p. 458). It is difference that makes us distinguish between territory and map, between paper and wood; it is difference that fuel neural transmission of information and it is the difference in physical forces that hammer a nail. In fact, Bateson argues that “the system shall operate with and upon differences” (p. 490). Using this perspective, I argue that it is the differences between human abilities that contribute to the adaptation of the system and within systems. For example, how could a world of only carpenters or only lawyers function adaptively or regeneratively? The difference of capabilities makes the human ecosystem flexible and interconnected.

The conditions for the ecological model to emerge in special education are propitious, as there have been attempts to connect elements of the situation of people with disabilities with the ecological model, in published works discussing de-institutionalization and integration in

community (Berry, 1995); social participation of children with disabilities in inclusive preschool programs (Tsao et al., 2008); and sexual abuse in special education (Skarbek, Hahn, & Parrish, 2009). Kauffman and Hallahan (1997) discussed least restricted environment (LRE) “placement as a problem of social ecology” (p. 325), explaining that in the 21<sup>st</sup> Century special education has no “holy place” or “promised land”. Shogren et al. (2009) adopted an ecological perspective when they discussed the social factors and core principles that influence and guide public policy for people with intellectual disability.

Similar to other ecological scientific fields pointed out in the previous section, the ecological approach is inherently an interdisciplinary and transdisciplinary approach where situated knowledge producers contribute to the theoretical and practical improvement of a given situation. The subtle difference between the ecological models of disabilities and special education pertain to conceptual and multiple issues concerning all types of disability (such as transportation, employment, housing, diagnostic and definition conceptualizations, and so on), and, respectively, to the nature of specialized education of people with varying disabilities. The ecological framework of special education is more specific and is included into the more encompassing ecological model of disabilities. The education of people with disabilities should ultimately target improving their chances of claiming their rights, contributing to the society, and accomplishing their full potential through the provision of education to meet the requirements for a future job, sustainable employment, and fulfillment of long-term typical-life goals. The situated knowledge producers that could contribute to these ecological models are experts in certain areas that impact disability studies, counting the individuals with disabilities themselves, their families and caregivers, educators, organizations, governments, researchers and practitioners of all kinds in this field (for example physical and speech therapists).

The ecological model of disabilities and special education borrows from the larger and neighboring frameworks involving ecological thought, and, in the same time, it does not depart from the human rights framework, rather it scaffolds upon it and its principles. However, it surpasses the HR framework and sets forth new specific theoretical and policy basic principles that can be applied in disability studies. Based on previous discussions on ecological models, I believe that the following principles are basic and essential to the ecological framework of disabilities:

1. *Interdisciplinary and, outstandingly, Transdisciplinary.* Given that disability itself has an interdisciplinary discourse, being described and researched by multiple disciplines, such as medicine, psychology, educational psychology, special education, health, and psychiatry, the field of ecology of disabilities is also both interdisciplinary and transdisciplinary. The interdisciplinary condition comes about with the influences of a variety of fields, including all of the above plus ecology, cybernetics, philosophy, sociology, cultural studies, economy, politics, policy studies, etc., but remaining within the bounds of the disciplinary research, in this case disability studies. The transdisciplinarity implies an ‘in-between’ state, as originally introduced by Jean Piaget in 1970, forming a dynamic unity of knowledge beyond disciplines – a discipline in itself;
2. *Permeable and Flexible.* Through the possibility of incorporating interdisciplinary concepts and methods, and constantly redefining itself as a transdisciplinary field, the ecological model of disabilities remains open to endless possibilities, conforming to evolving theory and practice, concepts and realities, logic and phenomenology;
3. *Complex and Connected.* The ecology of disabilities field functions as a complex system and it allows for bottom-up and top-down organization and agency, allowing for multiple levels of stigmurgy. Connectivity is inherent in a complex, network-like, system, within and among the multiple unities situated at different hierarchical levels. Active participation at each level and transcending levels of the stakeholders is essential to the ecological system (of disability). Robert Putnam (1995) states that horizontal networks are fundamental to civil society and are based on reciprocity, such as democratic societies. I believe that hierarchical networks, such as the ones in an ecological system, also contribute to progress of civil society and democratization of society;
4. *Four-leveled.* The model has at its center a system of four levels: (1) individual, (2) family and relations, (3) life-space, and (4) human space;
5. *Value-laden and Glocal.* In order for the ecological approach to be valuable and functional, it is necessarily entrenched in the culture of the region, country, or

- organization it is implemented in or through. For example, if a certain religion or tradition is essential for the population the ecological model is applied, then those values which do not trespass the central ecological principles should be locally incorporated. Ultimately, the ecological framework of disabilities will be ideally implemented globally;
6. *Located in Space and Time.* Connected to the previous statement, this model cannot escape the social, political, and economic space- and time-related circumstances. However, due to its complexity and range of issues it covers in disability studies, it both subjectifies and objectifies the social and natural environments, being capable of extracting generalizations and, thus, not deviating from its core general elements and principles;
  7. *Human Rights-Based.* The respect for human beings and their individual and exceptionally collective rights, including the rights to education and development, and respect for the rule of law and democracy are core elements for the ecological model of disabilities;
  8. *Democratic.* The individuals need to be free, for example to make their own decisions about the course of their lives, including about their education and development; hence, democracy and freedom are of ultimate importance. Tom Skrtic (1991) urges towards a new perspective at the special education system as a non-rational and non-just solution to the matter of disability to allow progress. He advocates for “adhocracy”, which allows innovation as opposed to standardization. Only then the institution of school can become “a problem-solving organization configured to invent new programs” (p. 182) and a democratic body.
  9. *Diverse.* Appreciation for natural, cultural, or any other form of diversity leads into honoring unique abilities, cross-culturalism (bridging the differences between cultures), multiculturalism (the co-existence of two or more cultures within a unit, such as an organization or even a person), gender differences, etc.;
  10. *Just.* The ecological model of disabilities focuses on equity and social justice (and, implicitly, human rights) to allow for multiple levels of participation in the system. However, this framework transcends social justice and implies relationships, concern for others, morality, and ethics;
  11. *Harmonious.* Coleman notes that the quality of relationships among individuals determines the harmonization of functions of social institutions, hence, the greater the pool of social capital, the larger and more complex social networks and institutions there are in that community (Coleman, 1990). Equilibrium and harmonious development within and among levels of the human and natural ecosystems provide space for the flow of physical and social energy and materials, synchronization, coordination, and collaboration of actions;

12. *Descriptive and Prescriptive.* As an open and mainly transdisciplinary field, the ecology of disabilities will receive much contribution from depictions and narratives of reality, as well as futuristic projections and philosophical thought;
13. *Generating Policy Wisdom.* Based on the prioritizing of values to the people with disability and their self-realization, on the existing empirical knowledge about methods of prevention and intervention, on the cross-applications from other fields, and on intuitive futuristic insights on the status of each ecological level as well as the statuses of relationships among levels, policy will be drawn. A deep understanding of disability issues and of the ecological system will contribute to bridging between good policy and policy wisdom.
14. *Metamorphic.* The ecological framework of disabilities is ultimately seeking changes in mentalities and transformations in the patterns of thought and behaviors for desired and new adaptations and accommodations to an evolving objective reality, to plan for conformity to its core principles;
15. *Sustainable Realization and Development.* Incorporating the ecological account into the ecology of disabilities, this field directly or indirectly supports self-realization or auto-poiesis, innovation, and sustainable development at individual, organizational, national, and global levels.

A definition of an ecological model of disabilities depends on the development or evolution over time of the concept of disabilities, and, due to the biological nature of disability, advancements in biomedicine regarding corrections of biophysiological impairments, as well as advancements in all other contributing fields; hence, this discipline is bound to remain an open and ever evolving field. It ultimately targets a change in mentalities, or, as Gregory Bateson (1987) puts it, ‘the reconstruction of patterns of thought’ to allow development, sustainability, freedom, and justice. The ecological framework of disabilities is idealistic, but it also has practical implications, as it is meant to set the standards for providing people with disabilities with just consideration and empowerment.

The ecological model of special education is also connected with the evolution of the understanding of *disability*. The ecologization of education will not only look into how the individual can meet the demands of the market, but will also treat the individual as a whole and strive to assist him achieve his or her ‘wholeness’. Unknowingly or consciously, the labor market

is already looking for transferable skills that cannot be directly taught and learned through formal education. Such pivotal abilities, like flexibility and adaptability for easing the transferability of owned skills, dedication, innovativeness, problem solving, and creativity can only be achieved through a holistic approach of personal development. The ecologization of special education would target the development of the individual as a part of the family, community, nation, and extended human networks. The need for inclusive development, entrepreneurship, and sustainable development calls for changes in the make-up and education of global biopower that come together in the ecological model for the education of people with disabilities, i.e. ecoducation for people with disabilities.

Within an ecological framework of special education, policy makers, administrators, teachers, and parents need not restrict their responsibilities to placement and advocacy, but their work should be consistent throughout the education process and pervade the life of children with disabilities in all developmental areas. Educators and educational policy makers need to enter a frame of mind where special education focuses on providing education for *today*, and one that considers the *ecospace* or *the niche* a person will occupy in society after graduation. Thus, education should focus on the *ultimate goals* for that person, i.e. epieducation or epiducation. Epiducation needs to pick up where *mesoducation* and *endoducation* leave off. The former is (focused on intermediate goals, such as getting a passing grade, or learning about water, and the latter is focused on the very purpose of providing education or accessing education). The prefix *epi* describes the fact that educators need to build *upon* what generations have already achieved, hence the concept of *epiducation* (from the Latin words *epi-* which means on, upon, and *duco*, -ere meaning to lead and to guide). In my view, *periducation* refers to the process of education itself and it is circumstantial. Secondly, the prefix *epi* can also refer to the Epicurean

philosophy of reaching happiness and tranquility in one's life through *aponia*, the absence of pain and fear. In this sense, the term epiducation has double and related meanings: that of focusing on long-term individual goals, and that of mediating towards the attainment of an accomplished and happy life.

Ecoducation would differ from environmental education in that that the latter specifically targets the fostering of ecological or environmental responsibilities. In contrast, ecoducation emphasizes, at the individual level, the best use of abilities for achieving auto-poiesis, sustainable employment, personal autonomy, and even complete independence. At the school-wide, community, and international levels, ecoducation regulates (a) a natural flow of human knowledge and human capital among the educational systems, i.e. different tiers and levels of education; (b) the transformation, and not loss, of human skill into the next best functional use; and (c) adoption, accommodation, and adaptation of the incoming flows of human knowledge capital so that a balanced relationship among the members of society be achieved. Hence, ecoducation focuses on the ecology and management of human knowledge and skills at all levels of the ecological model, and how it harmonizes with the rest of the ecological spheres. Ecoducation is meant to maximize students' potential as opposed to, as Hendrik Verwoerd said, education that prepares people in conformity with their opportunities in life and with their status (Lapping, 1987). On the contrary, students with disabilities should be educated commensurate to their needs and goals in life, and to opportunities that their typical peers benefit from. However, ecoducation does not mean holistic education, which is occurring mostly in non-academic settings, although these are compatible theories:

Holistic education is based on the premise that each person finds identity, meaning, and purpose in life through connections to the community, to the natural world, and to spiritual values such as compassion and peace. Holistic education aims to call forth from people an intrinsic reverence for life and a passionate love of learning. This is done, not

through an academic "curriculum" that condenses the world into instructional packages, but through direct engagement with the environment. (Miller, 2000)

The ecological model of education emphasizes the need to rechannel students' (with disabilities) energies on the long-term goals and adult future through the assistance of behavior and cognitive management individualized strategies that are based on age-appropriate and developmental skill advancement. In fact, behavioral ecology emerges from behavior modification. Because disabilities often occur in a co-morbid context (i.e., multiple diagnoses), it is all the more important to focus on practicality and to believe that constructivism is part of human nature. The early rechanneling of disabilities towards real-life skills would be an engaging ecologic solution, so that this ecodeme could find its niche in today's globalized system if provided the opportunity. Pivotal skills need be taught throughout school, especially for children with disabilities because their behavior is more likely to be influenced by environmental factors, for example, in the case of behavioral disorders that can be caused partially by traumas such as witnessing aggression or parental separation or divorce (U.S. Public Health Service, 2009). If disabilities have best been approached with treatments combining parental skill training, therapy for the child (U.S. Public Health Service, 2009), applied behavior analysis, and such methods specific to the special education field, why not attempt to adopt a broader approach to disability treatment by raising awareness across societal systems about the shared responsibility all of us bear for this ecodeme?

Opportunity is a key word, which implies reforming the current schooling system to a more open and practical-oriented system of education, a behavior-responsive and feedback-incorporating education. The educational and employment laws that are in place today advocate for an opportunity to equal benefits, but they do not ensure equal success. Special education today needs to provide more than accessibility. A reformed schooling system would provide

students with entitlement and empowerment, which are the most important factors that help poor people to rise above poverty (Amartya Sen, the Nobel laureate in economics in 1998, as cited in Gutierrez, 2006), as well as the most important factors that help people with special needs achieve a better life.

The practical ecology of disabilities is to stop children from playing the game of schooling and to teach them how to create and recreate themselves. Therefore, individuals affected by disabilities and their parents need to learn how to cope with episodic or chronic needs and how to use the concepts of readiness and success in their lives. Epiducation should provide intrinsic motivation and set the base for entitlement and empowerment in one's life. For the implementation of the ecologic model of education, i.e. one based on the skills needed for the person to be successful in life (whatever that means for the child, either college or employment), we need to ask ourselves what the higher goal for a superior benefit to the person we are educating or treating is. The answer to this question should drive the overarching goal of student's life-long education and student's individual autopoiesis. An ecological approach to placement recognizes the complexity, variety, and purposes of social systems and an ecoducational model would take into account modes of prevention, social acceptability, as well as educational methods of intervention. This way, the corpus of human capital will be utilized, and the ecodeme of individuals with disabilities will enter into an ecological sync with the society they should belong to, instead of being lost to society.

I highlight an idea that develops organically from the present times, when educators, administrators, and policy makers have seen that NCLB, in its current periducational and mesoducational form, is focused on intermediate educational goals for test performance, and it is nonfunctional, even dysfunctional, for the future of education. A broader view of education and

especially of special education, the “Cinderella” of educational fields, is not only needed and wanted, but imperative today. If we are talking about ecology of energy, recycling, and green jobs, why not emancipate the traditional view of education and special education, and talk about epiducation and ecoducation? In other words, education for the future *of the individual* and education for the future *of humankind* are both important. One learning design that incorporates the idea of education today for the future is Partnership for 21<sup>st</sup> Century Learning (2004), a national organization in the U.S. which emphasizes “world class knowledge and world class skills” (Kay, 2009). This type of ecological design for learning needs to be adopted on a wider scale, and it should be applied with all school populations, especially with the ones that can be rehabilitated or trained.

The question that policy makers, educators, administrators, and the general public need to answer is how can laws and practices regarding special education in the U.S. be modified to help the persons with special needs to avoid becoming part of the statistics that the Millenium Development Goals are targeting, specifically to end the poverty of this ecodeme, to combat gender-specific and ethnic inequalities, and discrimination manifested through the overrepresentation of males and minorities in special education high-incidence programs, to better provide timely and accessible child health care, to provide better universal education to all children needing it, and to integrate the special needs ecodeme into the sustainable development system of their country through ecoducation and ecoemployment.

The connection that Koïchiro Matsuura (2008), the director general of UNESCO, makes among human rights, peace, and quality education, is that they all have in common a key concept, that of creating opportunities for children to grow and learn on multiple levels. However, providing opportunity implies reforming the current schooling system to a more open

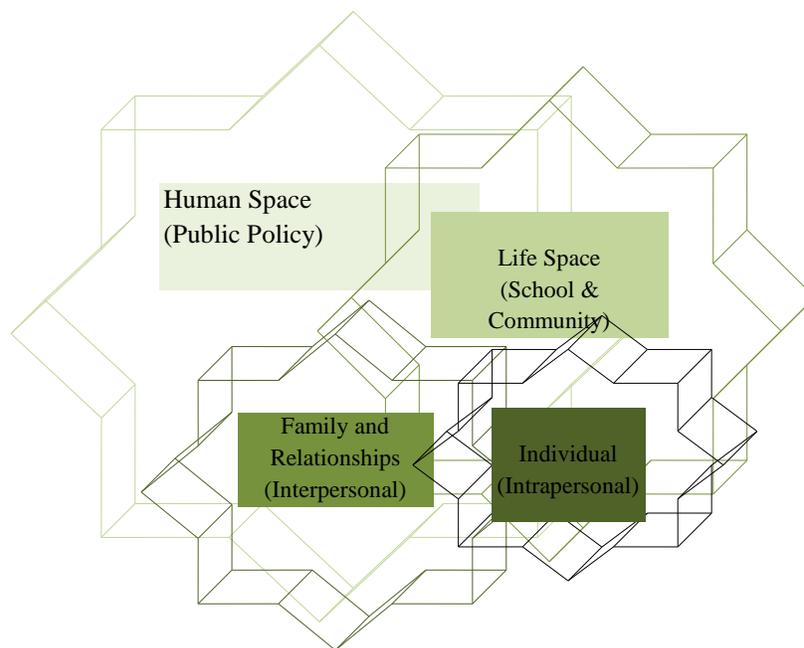
and practical-oriented system of education, a behavior-responsive and feedback-incorporating education. The educational and employment laws that are in place today advocate for an opportunity to equal benefits, but they do not ensure equal success. Indeed, the discourse of education tends to be isolated from the broader framework of life, that is social environment and natural environment, which Kose and Shields (2010) also point out. In order to achieve more success, multiple changes need to occur, and this metamorphosis in the school systems is fostered by the ecological model of special education.

### **Levels of Ecology for People with Disabilities**

The ecological frameworks of disabilities and special education should consider four important factors that influence disability. Building upon the concepts of ecology of Barker and Wright (1949), Brofenbrenner (1979), and Kauffman and Hallahan (1997), I identify the following levels: (a) human space, which encompasses the broad societal, political, economic, physical, and legislative environments; (b) life-space, referring to the school and community in which the person with disabilities lives; (c) family and relations or interpersonal, which includes family, friends, and intimate relations; and (d) individual or intrapersonal, which encompasses attitudes, knowledge and skills of the person with disabilities (see Fig. 2 & 5). These spaces, however, are organized as a meta-system, as opposed to Brofenbrenner's nested model, which resembles the organization of a super-system. Palmer (2011, p. 1) explains the difference between these two notions:

The meta-systems are distinguished from super systems which are nested levels of systems. A meta-systems is a deconstructed super-system and appears as a field out of which systems arise and through which they interoperate and cooperate. A meta-system is an environment or ecosystem for a certain level of system or anti-system pair. (...) The meta-systemic structures are a prototype for Gaia in which multiple species engage in Emergent Meta-system dynamics in relation to each other in a broader environment and thus create and regulate the cooperatively created environment that they share with other species.

John Holland has coined the term “complex adaptive systems” as “systems that have a large numbers of components, often called agents, that interact and adapt or learn” (2006, p. 1). But because the disability ecological framework does respond to and accumulates information, I deem it an *open* system. Hence, the system of education for people with disabilities and the one related to the construction of disabilities is, to say the least, an *open complex adaptive meta-system*.



*Figure 12.* Dynamic ecological model of disabilities and special education

**Human Space (Public Policy and Society).** The human space in which the phenomenon of disability takes place is described by the socio-cultural, policy-making, juridical, economic, and geo-political contexts at large. Alexander Wendt (1999) regards sovereign state interaction, in an international relations framework, as an anarchical systemic structure, where the distribution of power is constituted mainly by the distribution of interests, seen as cultural ideas. The needs of the states, identified with the needs of their subjects, are ranging, in order of

importance, from (a) physical security (food, water, sleep, fear of death), to (b) ontological security (stable expectations about the natural and social world around them), (c) sociation (the need for contact, interaction, and group membership), (d) self-esteem (honor, glory, achievement, recognition, power), and (e) transcendence (growing, developing, and improving). Thus, “in an international system where states possess substantial collective identity, it is unlikely that they will feel their security depends on balancing each other’s military power”, and so “it is more likely to secure themselves by observing the rule of law in settling their disputes, and by practicing collective security when threaten from outside, which is a kind of bandwagoning based on the principle ‘all for one, one for all’” (p. 106). In this context, which is a constructivist structuralist view where “social structures have effects that cannot be reduced to agents and their interactions” (p. 138), international cooperation, international institutionalization, and international laws are essential to prepare the terrain for shaping the identities and interests of states, as well as for the distribution of ideas in the system, and where the rule of law and interests are seen as tools to an end and not ends in themselves.

Kauffman, Lloyd, Hallahan, and Astuto (1995) spoke to the interconnectedness among the actors from the various layers of the ecological hierarchy of disability and special education: “Educators and social scientists with an ecological bent are interested in the development and structure of human communities and the ways in which the presence of individuals with certain behavioral characteristics alters the pattern, rhythm, or course of social interactions or relationships” (p. 329). Gregory Bateson (1987) defines a “healthy ecology of human civilization” as a “single system of *environment combined with high human civilization* in which the flexibility of the civilization shall match that of the environment to create an ongoing complex system, open-ended for slow change of even basic ... characteristics” (emphasis in the

original) (p. 502). His daughter, Mary Catherine Bateson, went on to explain that the habits of mind in need of transformation her father referred to are “short term solutions that worsen the problem over time (...); the focus on individual persons or organisms or even species, seen in isolation; the tendency to let technological possibility or economic indicators replace reflection; the effort to maximize single variables (like profit) rather than optimizing the relationship among a complex set of variables” (Bateson, 2000, p. viii). Hence, an out-of-the-box type of thinking is needed to change these habits of mind along the lines of finding long-term solutions and developing a non-isolational and reflective reasoning.

A real change in patterns of thought and behavior cannot be done only at the level of governmental agencies, without the cooperation of non-governmental organizations and private companies. Under the UN secretariat of Kofi Annan, the Global Compact initiative was launched in July 2000, which brought together companies, UN agencies, and organizations in the areas of labor, human rights, environment, and development to “pursue good corporate citizenship and responsibility” (Encyclopedia of the Nations, 2010). This was a most welcome initiative that motivated responsabilization in the private sector that sets the stage for a change in an ecological direction of mentalities and habitus. Disability organizations play an important role facilitating among national governments, people with disabilities and their families, and other disability organizations from the same country or from other countries. Advocacy organizations are conferring support for raising awareness, monitoring improvements, identifying new directions of improvement, ensure that legislation is enforced, and develop connections with other ecological entities (Lawson, 2006).

Policy makers and advocates for disability rights are the ones that can bring about changes in human space realm that would positively impact people with disabilities. They should

extend their work beyond physical de-institutionalization principles, and begin to focus on true inclusion of persons with disabilities who are abandoned (orphans), and who are from various ethnic backgrounds. Improvements in the human-space ecology of people with disabilities call for changes in the international adoption legislation of children with disabilities currently in state institutions and full inclusion in communities. This means that prejudice against people with disabilities or against people deriving from minority groups needs to stop. The advocacy for international adoption of institutionalized children or children eligible for institutionalization who need a home and a family would also increase the ‘desirability’ or ‘marketability’ of these children for the domestic adoption agencies. The national judicial systems and other administrative entities need to work to catch up with the international legislation on disability rights and, consequently, rule and tailor such policies to their national resources and realities. Also, state governments need to be financially and logistically ready to comply with future judicial rulings in the favor of people with disabilities (e.g., public transportation, public parking, access in public buildings, employment, education in least restrictive environment, employment of paraprofessionals, etc.). International and domestic policies regarding disability rights emphasize equal opportunity, but do not ensure equal success in school or in life. Respecting the basic rights of people with disabilities, including the right to a family and to participation in community, would increase their success for independence and self-realization. More inclusive knowledge communities produce better theoretical frameworks, more extensive and accurate knowledge and policies that, in turn, improve more lives. There is a continuous cycle of interplay among theory, research, and practice that parallels a synergy of working, monitoring, evaluating, intervention, and prevention of disabilities.

**Life Space (School and Community).** The life-space represents “the world as it exists for the person and as it affects behavior” (Barker & Wright, 1949, p. 132) and is described through a look at the institutional arrangement, social environment, and the educational process itself in and through which the child develops through social interaction and education. We cannot talk about a healthy community without incorporating all the people, including the most in need of support and we should not forget that social norms from a community influence allocations of roles of its members. A healthy community,

Changing the conditions in the existing institutions where people with disabilities are cared for and educated and in the public and private schools is imperative for the population with disabilities. Universal design in architecture started with the work of Mace (2010) when he took into account the access needs of the broadest range of users in public spaces from the inception of the architectural projects. Soon after, the Universal Design for Learning (UDL) was developed, which envisions a curriculum where subtle adaptations addresses multiple and unique modes of learning by scaffolding, a multiple of instructional approaches, and supports. The concept of universal design is directly compatible with the ecological model of special education as it addresses the needs of the learners, as well as being grounded in the given physical and socio-cultural environment.

In this space there is the danger of homogenizing the skills of students with disabilities through fostering limited or limiting skills. Kauffman advocates for disaggregation of disabilities, in the sense that each category of impairment, down to each individual, needs to be viewed and intervened upon separately, in order for the IDEA provision to ensure appropriateness of education for all (Kauffman, 1993). Hence, the best practices and empirically supported approach need to be practical and individualistic. In the case of the students that need

continuous training, IDEA legislation prevents regression of recently gained abilities or in danger of regressing through either extended summer programs or summer camps.

When employing the ecological model in a classroom, one needs to consider the environmental systems and influences the students are immersed in, the connections between school and families, recognize the importance of the student's background (such as culture, socioeconomic status, language, religion), the abilities as well as challenges that the student may meet in the learning process and in the school environment, and naturalistic materials, methods, and adaptations the student may require. In 1979, Albert R. Marston wrote that

behavior modification is ready to expand its theoretical and professional base to one which can be described as *behavioral ecology*. At each level of operation, from individual therapy to broad social applications, behavioral change involves complex rearrangements in the systems surrounding the focal behavior. While symptom substitution in the psychodynamic sense may not be demonstrated, each therapeutic intervention produces a variety of effects both within the person and in his interpersonal network. At the broad social level, behavior modifiers who consider applications of their methods to such problems as population control also need to consider the complex systems effects in any decision to focus on a particular behavior (p. 147).

However, almost 30 years later, Linda Graham (2008) argued that schooling itself, along with overemphasis on television, video games, food additives, parenting praxis, discipline practices, and so on, contributes to forming scattered attention patterns in developing children: “the influence that the discourses and practices of schooling might bring to bear upon the constitution of ‘disorderly behavior’ and subsequent recognition of particular children as a particular kind of ‘disorderly’” (p. 7).

Behavioral ecology entered timidly into special education instruction, in the form of naturalistic teaching materials, reinforcers (desired stimuli) and punishing stimuli (such as automated toys without batteries), generalization and maintenance environments (that is, environments in which the behavior is supposed to take place naturally), motivational choice making, pace of cuing and prompting, degree to which the level of instruction matches student's

current behaviors, ecological structuring of learning, and inclusive settings in which instruction takes place (Wolery & Schuster, 1997). Further, Wolery and Schuster (1997) pointed out that much work remains to be done, prioritizing the following areas: structure of instruction, instruction setting, motivation-enhancing variables, and modalities of delivering instructional methods. In response, Fredda Brown (1997) observed that a broadening of the research in special education would not be sufficient, but that a paradigm shift would be desired. Such a paradigm shift is provided by the ecological model of special education, where the heavy introduction of naturalistic variables in the areas identified by Wolery and Schuster would be emphasized. Methods of personalized intervention that target behavior shaping and academic learning should be naturalistic as much as possible, and should converge with the harmonization of prevention and treatment.

Today, equity rather than equality should be targeted in inclusive education discourse and practices, for the benefit of not only individuals with special needs, but of the entire society. The secluded approach to their care made people with disabilities and minorities more vulnerable to discrimination and even more marginalization. To date, discussion has focused on the benefits of inclusion for people with disabilities. There is a benefit society at large for inclusion of the marginalized. Children would learn from an early age to understand, value, and preserve diversity, unique abilities (including forms of overcompensation of shortcomings or splinter skills), freedom, physical and mental health, and other issues related to the human experience.

At the level of school management, transformational leadership refers to organizational goals, while transformative leadership refers to methods to achieve emancipation, democracy, justice and equity, decentralization of power, and morality. The latter concept is fitter to interweave with the idea of the ecological model for special education. Transformation, human

rights, connection with higher goals, and emancipation are also several the core principles of the ecological model of disabilities, which help policy makers and practitioners question, re-envision (or “revision”, to use the word of Kose and Shields, 2010), reflect, select, emphasize on our environment and processes of being, doing, and having. Within an ecological framework, policy makers, administrators, teachers, and parents need not resume their responsibilities to placement and advocacy, but their work should be consistent throughout the education process and beyond. “It is therefore important for a leader to ensure that educators envision a purpose beyond that of having all students (and groups of students) meet expectations on annual standardized tests” (Kose & Shields, 2010 , p. 11). Educators and educational leaders need to enter a frame of mind where education focuses on providing instruction for *today*, and one that considers the *ecospace* or *the niche* a person will occupy in society after graduation. Thus, ecological special education should focus on the ultimate goals of the person with disabilities and, hopefully, of the society.

**Family and relations (Interpersonal).** Close network support, stemming from family and relationships, is a crucial factor for people with disabilities, as this type of involvement could determine the future development of the person with disabilities. Family resources, such as financial resources, values, attitudes, habits, and emotional support can foster or impede the preparedness for schooling, the learning process, and individual harmonious development of the student with disabilities. It has been shown repeatedly that successful inclusion has best been achieved through treatments combining parent and student skills training.

It is the family or caregivers that should determine and negotiate the functional skills to be targeted in the Individualized Educational and the Transition Plans (IEPs and ITPs), as well as the acceptable methods that the instruction will be delivered through to their child. It is also the family and caregivers that should serve as models in life for the children and students with

disabilities, and it is them who are expected to advocate on the behalf of their child or adult with disabilities. It is families that can be excluded from communities because of the disability event in their life, and it is their course of action that could change not only their protected, but also could bring about changes in their smaller and larger communities.

**Individual agency and development (Intrapersonal).** A fourth level of the ecological framework is that of a particular individual, translated in the empowerment invested and self-invested into the person with disabilities to develop personal agency. Mary Catherine Bateson (2000) reminded us about her father's urge that "the process of systemic adjustment would require self observation and self knowledge" (p. viii), which gives a measure of the importance of the intrapersonal labor.

On an individual level, the ethnically marginalized populations and populations with disabilities are still disempowered and disempowered. People themselves know the best ways that the needs of people with disabilities can be met, and people with disabilities themselves (and/or their caregivers) should take action to anticipate and guide directions for change, rather than awaiting action from foreign entities or the states to address their needs. The current disempowerment results partially from the fact that not many marginalized people are working in or for the system of services that cater to the needs of people with disability diagnoses, and partially from the fact that not all people with disabilities or from minority groups have the same needs. Grassroots movements in the fields of special education and disability rights should be encouraged. The people with disabilities (or their caregivers) know what their needs are, and they need to make their voices heard in claiming services (a human rights component). Ultimately, the prioritizing of resources and efforts rests upon the sense of agency of each one of the people affected by disability, either themselves or their loved one.

The personal strengths and challenges of each individual impact not only the short-term and long-term educational goals, but also the outcomes of the learning process. Doidge (2007) talked about the neuroplasticity of the brain by bringing testimonies to how the brain can change its own structure through changing the pattern of thought and activity, and recovering from physical and emotional trauma. I propose that changing these thinking patterns which, in turn, will alter the attitudes towards people with disabilities could be brought about through the small wins strategy, presented in the following concluding chapter.

## Chapter 7

### **Mixed Methodology Results, Recommendations, and Future Research**

In the beginning of this study, I discussed how society creates disabilities, since their definition is highly contextual, based on the translation of impairments into environmental or ecological contexts. For this reason, I adopted the ADA, ICF and UN disability definitions, which reflect a social model of disabilities. The ADA definition of disabilities emphasizes perceived by self or others disabilities, while the other two definitions stress the interdependence between the environment and the abilities of the person, the unspecificity or continuum of the nature of disabilities, and the development of the concept of disability. Disability has been discussed in relation to poverty, the overall development of the nation where people with disabilities live, and to the respect for human rights experienced, hence, implicitly, the degree of democratization of the political regime from that country.

I started my research with two research questions: (a) What factors influence the full inclusion of people with disabilities in their communities?; and (b) Is there an improved model of disabilities and special education that allows for the successful inclusion of people with disabilities in educational programs and the society? I adopted a mixed methodology approach, using a post-positivistic complemented with a constructivism-interpretivism paradigms.

In order to attempt an answer on how to achieve successful inclusion for people with disabilities, I lead a quest to identify what factors determine or influence the inclusion and exclusion technologies of people with disabilities. I start my quest with a quantitative analysis that contributes to strengthening my argument developed in the interpretive methodology, in tackling into what societal characteristics or circumstances target non-discrimination, equity, and non-biases for people with disabilities. The results from the quantitative methodology reveal that people without disabilities are more prepared to take care of people with disabilities when the

level of development of the country is higher, when the people have more freedom of expression and hold the government accountable for its actions, and when the level of corruption is under control. However, a greater concern for the well-being of people with disabilities is correlated with a high level of country development, a decreased value of political stability and absence of violence, a decreased level of government effectiveness, and a greater level of law enforcement. None of the dependent variables are significantly correlated with the level of education from a given country. This was somewhat surprising, due to the intended and even unintended function of education as a social reproduction tool. If the Concern and Preparedness variables were correlated with higher education levels, then the MDGs, as international guiding agenda, and implicitly nation-states, should target secondary and/or tertiary education levels as mandatory. However, this study did not render such results, although it is possible that the level of education in conjunction with other variables could have a significant statistical relationship with people's attitudes towards disabilities.

One other important by-product, that the quantitative analysis renders, is that research and practice lacks an internationally-established Human Rights Index or a Disability Rights Index, and the need for both is made obvious in this study when I had to compile three factors to substitute for them. From the World Health Organization we learn that an indicator needs to be sufficiently important in the national policy agenda to be included in a country's census questionnaire. Hence, for the disability statistics not to be omitted in domestic reports, enough internal and external pressure needs to be exerted on the nation-states' governments. The very existence of such indices would set in motion a frame of mind of thinking about human rights at national and regional levels, and hence more attention would be paid to the components and antecedents of these indices.

The post-positivistic stance on knowledge as nonfoundationalist and prone to fallibilism is helpful in this study because it calls for caution in weighing the results of the quantitative analysis more than we should. The limited availability of the data on attitudes regarding disability and from Western countries, the nature of the data based on self-reported scores, the nature of the statistical correlation between variables which does not target causality but relationship among variables, and the lack of a clear-cut index on human rights or disability rights, narrow the utility of the quantitative analysis. Nevertheless, these results are very useful within their limited scope, and enhanced in the following chapters by the interpretive discussion and results.

Chapter 3 discusses international, European, and United States' disability rights provisions that are emphasizing the need to access education and training for self-development and for the labor force, borrowing from each other elements that fight discrimination of people with disabilities. The UN, EU, and US standards, programs of action, and provisions represent, first, the Anglo-American philosophy on disability rights, but also represent different levels and phases of the 'rule-setting' processes in establishing an international human rights order. The Anglo-American law, in a broad sense, is the basis of common law in legal systems, such as the England, Wales, most of the United States, and part of the European Union law. The common law, and hence the Western law, is based more on morals or virtues, duty, and utility (Donnelly, 2003) and is made by judges and their common sense and knowledge of legal precedents. Hedley Bull (1971) talks about the necessity of existence of general rules prior to their enactment into enforceable legislation:

It is difficult to conceive of international order apart from norms or rules: in particular, elementary or primary rules requiring states to limit the violence they bring to bear on one another, to honour undertakings and to respect one another's spheres of jurisdiction. (...) These rules are prior to international law, international morality and international

institutions; they may have the status simply of operating procedures or 'rules of the game'. Their existence in some form is a necessary condition of ... an international system. (...) But these rules of the game are strengthened if they are embodied in institutions (p. 270-1).

Such institutions are the ones I discussed in this study: the United Nations at international level, the European Commission at the European Union level, and the governmental institutions at the United States level.

Without the inclusion of children with disabilities, the second MDG goal, universal primary education, is unachievable. Provision of education, from primary to tertiary education and employment training, would provide the incremental changes in society to allow the implementation of education and disability rights. It may take from several years to several generations for widespread changes to occur and for small wins to be made, but the smaller the degree of provided education exposure, the smaller the changes in society and the longer the anti-discrimination fight. By consistent and continuous formulation and implementation of education rights for people with disabilities, the disability education rights could and should become customary law in the states and regions where the treaties protecting the entitlement to education of persons with disabilities have jurisdiction. The World Report on Disability factsheet (WHO & World Bank Factsheet, 2011) provides a unified image of the barriers that people with disabilities encounter: "inadequate policies and standards, negative attitudes, lack of service provision, inadequate funding, lack of accessibility, inadequate information and communication and lack of participation in decisions that directly affect their lives".

In concluding Chapter 4 on special capital, I advocate that people with special needs would benefit, in the long run, not only monetarily from formal education and vocational training, but also in terms of their socialization and self-esteem, building their social, cultural, and symbolic capital. I ascertain that inclusion of people with disabilities needs to occur at two

levels: through education and employment, and, broader, at a societal level through removing barriers to succeed as citizens. They have the potential to perform a job as well other people, if not better than other individuals in some instances, due to increased training and special characteristics (such as attention to detail in some cases), and with more satisfaction and benefits in the long run.

This chapter emphasizes the importance of special capital as non-negligible source of human enterprise, imperative in its turn for sustainable development and progress. Globalization and an increased awareness for sustainable development are slowly leading to a homogenization of ideas in terms of human capital. Historically, the people with disabilities have been marginalized, multiply discriminated, and disempowered. In this study, the inclusion of people with disabilities in the human capital pool is rationalized from a quantitative and a qualitative addition to the pool of human capital. As the demographic group is broadened and more skilled, we can expect an increase in the development of the market, increased quality social interaction, and knowledge. Solutions that stem from situated knowledge and experiences rather than from arm-chair borne theories contribute to identifying key omissions, bring in missing concepts, draw better approaches to improving the quality of life for people with disabilities and the advancement of a healthier society, and, ultimately, lead to adopting transformative policies and all areas of live, including education and job training. Disability equity may be more difficult to accomplish than gender equity because exclusionary policies of disability are entrenched deeper into social norms, and because returns to education for people with disabilities may not be as visible and as immediate (due to longer training periods) as in the case of including women into the work force. However, the quantity and quality of the work, when it is best used, should be just as reinforcing.

This work is intended to remind the scientific and laymen communities about important factors to be considered for future development, such as elimination of food insecurity, improvements in education and other human services, the need for developing human enterprise, the need to re-evaluate the human factor, and empowerment for all. Pinstруп-Andersen and Cheng (2007, p. 96) note that elimination of hunger implies adoption of policies that target poverty, “most crucially on agricultural development, basic education and health services, and good governance”. Similarly, Amartya Sen as cited in Joshua Hammer (2006) advocates for democracy because it is the form of government that provides “a reason to prevent famine, because the penalty of famine is that the government can lose an election over it” (p. 27), and because the free media helps bring sensitive issues to the surface. Dewey’s view on democracy closes the circle of my rationale for advocating for special capital development that “democracy and the one, ultimate, ethical ideal of humanity are (to my mind) synonymous” (Dewey as cited in Anderson, 1993, p. 383). In a broader view of good governance, I see it to mean a strengthening in democracy and the rule of law to guard human rights, as well as ecological management of resources, including special capital, for sustainable development, where "sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (UN Documents, 1987).

The meta-evaluation of the UN PACDP (Chapter 5), as a global strategy that advocates for equalization of opportunities, empowerment of persons with disabilities, and disability rights, reinforces the need not only for a renewed evaluation of the Programme, inasmuch as more than five years passed since the two available reports were written using obsolete data (i.e., it is at least 15 years old), but also for a comprehensive evaluation from multiple perspectives. The evaluation for learning, education, and use has the potential to assist the evaluation community

and stakeholders to learn more about the functioning, implementation, and outcome mechanisms of this global program. The evaluation for democratic principles and public good fits the values of the UN PACDP program very well and contributes to the global policy dialogue and disability discourse. These evaluation genres build upon each other and compensate for their drawbacks if used together or in combination with other types of evaluation for reporting on the UN PACDP by a multitude of evaluation individuals or agencies, levels, and/or contexts.

Chapter 6 on ecology aims to contribute to the theoretical integration of ecological principles in the field of disabilities and special education. While the human rights-based model for disabilities emphasized protection and respect for achieving service delivery and capacity (special capital) development for all, the ecology of disabilities is based on the interconnectedness and cooperation of people (regardless of their race, ethnic background, ability or disability, level of education, etc.), governmental and non-governmental agencies, and on the understanding that the effect of living together and benefitting from each other's experiences benefits everyone naturally rather than in a planned, artificial, and contrived manner. The ecology of special education is specific to the education of children and adults with disabilities and it is directly compatible with the ecological model of disabilities. This latter framework is designed to address practical teaching and learning factors for people with disabilities, from self-management strategies, to family practices, to classroom methods, and, finally, to policy making and implementation.

These ecological models can be applied to all levels, but also to subsystems, such as national, organizational, and global. The ecological models can also be applied to a different segment of population, hence, these recommendations are not necessarily exclusive to a country or the disability context. However, the ecological model needs to be locally implemented or

glocalized, that is, global principles or measures should be tailored to national traditions, laws, and resources. The principles outlined in these ecological frameworks call for a unified effort to improve the quality of life for the ecodeme with disabilities. As they advocate for the pursuit of individual-well being within the larger society, both models call for practical changes in a multitude of areas, including legislation and policy, training of professional personnel, sufficient financial input in programs designed for the care of children and adults with disabilities, change in societal mentalities to fight discrimination, disempowerment, and isolation. This is the moral message that the society needs to achieve in order to truly experience participation in broader citizenship. “As citizens of a larger international community, we have an obligation to work together to ensure that a child’s health and happiness ultimately govern our actions” (Commission on Security and Cooperation in Europe, 2005, p. 82). For the scope of ecological frameworks is immense, both interdisciplinary and transdisciplinary, further research possibilities are countless. The ecological perspective opens the fields of disability studies and special education to new theoretical and empirical possibilities.

The human rights framework provides a philosophical start point and the legal basis for the implementation of an ecological framework of disabilities and special education. Donnelly (2003) emphasized that human rights provide a “moral vision of legitimate governance” (p. 42), and argued that “a system of equal and inalienable rights cannot be sustained in the face of social practices that deny the possibility of each enjoying his or her rights equally. As individuals, proponents of racial domination, for example, have the right to hold, perhaps even advocate, their views. But efforts to implement them in practice fall outside the international consensus on human rights and may be – must be – resisted with vigor” (p. 53). Therefore, the guidance of human rights recommendations is essential to the application of the ecological framework in

practice. Because people themselves may have less bridging and bonding resources, institutional bodies can play the role of uniting disability rights movements within the community of persons who experience disability with the community as a whole, and, hence, a legal framework is mandatory, but not sufficient, because the limitations on basic human rights are the social laws or behaviors and attitudes that oppress people. HRBA is a legal approach that allows for mutual international agreements, while the ecological approach permits a greater social-scientific and interactionist model with different disciplinary backgrounds.

Results from both methodologies converge to a certain point, but do not undoubtedly differ entirely; rather, they complement each other. One common result for the two methodologies employed herein is that disability is an evolving concept when viewed in a broader context, which integrates the four spaces that the ecological framework incorporates.

Another mixed methodology result is that factors such as economic, social, legal, political, and natural resources and contexts contribute to the health, education and employment opportunities, and to the overall well-being of people with disabilities. While certain democratization indicators are correlated, together with the HDI, with the Concern variable, the remaining democratization variables are correlated with the Preparedness variable, with no WGI indicator that comes up in both final statistical models. This is perhaps due to the conceptual distance between the two dependent variables: Concern refers to how the society relates to people with disabilities, while Preparedness emphasizes a readiness or a condition for immediate action. In turn, there are various other factors that are influenced by these two variables. The ecological framework sees all these factors from a meta-systemic perspective, where bi-directional interactions are expected and desired, and also from a human rights point of view, where the inherent value of people is upheld at its highest standard. Even if the level of education

is not statistically significant when analyzed in correlation to how prepared and concerned people without disabilities are in regards to their counterparts with disabilities, the quality of education, in turn, depends on the other factors mentioned above. For example, we cannot have good quality education or any education at all in the middle of a war; critical thinking cannot readily be developed without freedom of thought, expression, and congregation; also, education stops being a priority in times of famine.

A third important finding is that empowerment (reflected in the quantitative analysis in the HDI) and the distribution of power (reflected in the democratization variables) are important factors in the evolution of the concept of disability, the societal attitudes towards disabilities and preparedness to act for improving the life of people with disabilities, resources provided to people, as well as sources for changing mentalities regarding disabilities. One last integrated finding refers to gathering data on various variables related to the phenomenon of disability and from representative samples (i.e., not limiting research to the countries that are part of the Council of Europe) and to feedback from disability programme evaluations, which render important reverse connections that further contribute to the rebalancing and improvement of the ecological systems. While the quantitative analysis showed that some attitudes of the society can be influenced by the level of development and democratization, the interpretive methodology, discussed more factors and sub-factors that would contribute to the change in mentality. Hence, one unifying conclusion of this study is the urge to adopt an ecological framework at an international level, based on the unifying and best venues provided by the UN guidelines and charters.

## **Recommendations: The Small Wins Theory**

I propose the implementation of a strategy based on the theory of small wins that would continue the innovation that the prior phases of disability movements set the stage for. This strategy calls for a new frame of thinking about changes and choices, in the context of providing access to education and establishing the seeds of democratic gains for a sound application of disability rights.

The small wins theory was first put forward in 1977 by Tom Peters in his dissertation “Patterns of winning and losing”, where he coined the idea that constant gaining on a small scale is a more secure road to success than a radical change because “the best indication of good coaching may be the ability to induce consistent high performance against weak opponents rather than against strong opponents” (Peters, 1977, p. 286, as cited in Weick, 1984, p. 42). Later, Karl Weick applied the small wins theory to psychology and sociology, invoking the Yerkes-Dodson Law, which states that there is an empirical relationship between arousal and performance graphically represented by an inverted U-shape curve. Therefore, “when the magnitude of problems is scaled upward in the interest of mobilizing action, the quality of thought and action declines, because processes such as frustration, arousal, and helplessness are activated” (Weick, 1984, p. 40). “The strategy of small wins incorporates sound psychology and is sensitive to the pragmatics of policymaking” (Weick, 1984, p. 40), hence it can serve as a model of strategic planning in educational leadership calling for activism, pragmatism, and equity at one time.

A small win is a concrete, complete, implemented outcome of moderate importance. By itself, one small win may seem unimportant. A series of wins at small but significant tasks, however, reveals a pattern that may attract allies, deter opponents, and lower resistance to subsequent proposals. Small wins are controllable opportunities that produce visible results.

[...]

Once a small win has been accomplished, forces are set in motion that favor another small win. When a solution is put in place, the next solvable problem often

becomes more visible. This occurs because new allies bring new solutions with them and old opponents change their habits. Additional resources also flow toward winners, which means that slightly larger wins can be attempted (Weick, 1984, p. 43).

Weick identifies two types of small wins. One is the isolated small triumph that can mislead people about how to sustain change, and the second one is the continuous applied formula for success that assists in identifying patterns for long-term success. The small win strategy is a chain of slight gains applied diligently for a broader goal.

Gary Hamel (2002) wrote a book on how to make innovation a way of life in corporations, and advocates for adopting a small-wins strategy to capitalize on the successes of a revolution. He says that small wins need to be nurtured by top management in order to become entrepreneurial, otherwise they remain small things. Incremental innovation is not enough, but an entrepreneurial innovative thinking that re-writes the rules of the game is needed. Hamel outlines several steps on how to start a revolution, with Step number 7 advocating to “Win small, win early, win often” (p. 202). Becoming an activist who builds on the existing positive values and brings about positive change is preferable to being a revolutionary that can destroy to the core the existing values and culture of the organization. “In the age of revolution, we need organizations that celebrate activism” (p. 209). He also drafts an activist’s necessary characteristics: honesty, compassion, humility, pragmatism, and fearlessness. Grass-roots activism done in this way obtains the support of top management once the realization that the core structure is not in danger comes into play.

Grauschopf (2010) describes several reasons referring to tangible wins, specifically that small wins: (a) show that success is possible; (b) are functional, i.e., of immediate use to the winners; (c) are inspiring for further small wins; and (d) prepare us for big wins. Initially employed in an economic context, Debra Meyerson and Joyce Fletcher (2000) are applying the small wins theory to the social infrastructure of corporations and organizations. They are

proposing this strategy as an alternative to the dramatic changes brought about by a revolution in women anti-discrimination matters. They describe small wins as “incremental changes aimed at biases so entrenched in the system that they are not even noticed until they are gone. Our research shows that the small-wins strategy is a powerful way of chipping away the barriers that hold women back without sparking the kind of sound and fury that scares people into resistance” (p. 128). The "small wins" approach (Meyerson and Fletcher, 2000) advocates transforming a workplace through a series of small positive changes used to improve the working environment for those who are disproportionately affected by unsupportive and oftentimes inconsiderate practices in the workplace. They mold a strategy for applying the small wins strategy: diagnose the problem, uncover the roots of inequity, establish open dialogue, and link equity to effectiveness. Thus, the power of small wins consists in opening the possibility of change by identifying the inequity, combining changes in behavior with changes in understanding, linking the local to the global, and having a snowballing effect into more and deeper changes.

In this chapter, I adopt the small wins strategy as a means to continue and sustain the gains of previous changes in disability and feminist studies such as the principles of anti-discrimination, inclusion, equality and equity, because the theory of small wins “addresses social problems by working directly on their construction and indirectly on their resolution” (Weick, 1984, p. 40). I believe that by implementing the strategy of small wins to the problematic of disabilities, activists can raise the level of awareness and co-opt even more social reformers on their side who will ensure more durability of the effects of their work than a sudden and drastic change that does not scaffold on practical measures. Although this strategy could be applicable to the problems that affect both ecodemes separately, I believe that it is more so appropriate for

the highly sensitive and delicate issues involved in the double or multiple discrimination patterns affecting people with disabilities in their lives.

### **Small Wins and the Ecology of Disabilities**

In this concluding section I will address the question of how can small wins theory be implemented in developing policies and change realities for people who are impacted by disabilities in their lives, corresponding to the third phase recommended by Meyerson and Fletcher (2000), linking equity to effectiveness. The injustices against people with disabilities are many, of which some were presented herein. Rather, I will provide several directions of action that illustrate a small wins manner of thinking and represent the experimentation phase that Meyerson and Fletcher (2000) identified. The authors explain how the processes of assimilation, accommodation, and celebration of differences do not have a comprehensive effect on eliminating discrimination. A fourth approach applied to disabilities, is based on the belief that discrimination “is rooted in our cultural patterns and therefore in our organizational systems. (...) It emphasizes that existing systems can be reinvented by altering the raw materials of organizing – concrete, every day practices in which biases are expressed” (p. 131). The small wins strategy is based on “small initiatives – or several at a time - that try to eradicate the practices that produce inequity and replace them with practices that work better for everyone” (p. 131). Houzes and Posner (1995), for whose book Tom Peters wrote the forward, suggest finding a core theme and a central person that can execute the change, acting with a sense of urgency while providing choices for change, and opt for changes visible to many. On the other hand, small wins strategy makes those who espouse it think opportunistically, take small risks, reserve a relatively low-cost investment, and skillfully employ realism. And such, the record of small-wins builds up to a big impact. But in case a small wins project is not successful, the lost is

relatively small because the change expectations and resource commitment were low. Although the principle of ‘small things make big things’ is omnipresent in life, the small wins principle is something more than just how changes are achieved. It is more about how to ensure a mentality of success and positive innovation. “Small wins are like miniature experiments that test implicit theories about resistance and opportunity and uncover both resources and barriers that were invisible before the situation was stirred up” (Weick, 1984, p. 44). Because this strategy “creates change through diagnosis, dialogue, and experimentation” (Meyerson and Fletcher, 2000, p., 182), it is intrinsically a democratic strategy, based on identification of a problem, evaluation, negotiation and mediation, and experimental application, followed by another cycle of these processes when needed. In acknowledging small wins, one gains confidence in the choice that was made. Since the changes produced by "small wins" are incremental and locally driven, the approach is non-threatening and more easily accepted by an entrenched culture such as often exists in the traditional societies. Successive ‘small wins’ build upon themselves such that substantive and lasting changes in the work environment and culture are achieved and assimilated over time.

This strategy is intended as a bottom up approach, but, because it was also used in large organizations, it can also be applied top down, and so it remains faithful to the principles of the ecological framework. In other words, both communities and governments can prioritize directions for change. In this case, a first step that governments can take is on an *ethical and juridical* level. Domestic governments need to consider signing and ratifying regional and international human rights treaties that target people with disabilities (and discussed in Chapter 3) that would set the legislative stage for change. Many times these directions for change are already embedded in the national legislature. Then, governments should take full opportunity of

all situations that arise to make small steps towards achieving the final goal of non-discrimination and equal opportunity. Developing states should follow the example of other countries or follow similar steps they themselves used in making changes in other areas when accommodating international human rights and democratic discourses to the cultural specific of their state's jurisprudence. Although democracy plays an important role in the development of an array of real choices, more is needed. Sen (1999a, 1999b, 2000, & 2003) and UNDP (b, 2009) acknowledge that it is not only freedom that assists individuals and peoples to make choices in life according to personal preferences, but also health, education, and income, i.e., human development (Vollmer & Ziegler, 2009). Hence, both a 'forest view' and a 'tree view' are needed in implementing small wins strategy to accomplish a practical instrumentation of ecology of disabilities.

A second set of changes that states should consider is at the *economic* level. That is, to invest in developing the physical (e.g., roads, school and hospital buildings) and administrative (e.g., clerks, teachers) infrastructures that enable the implementation of the adopted legislation. Since hearing loss, vision problems, and mental disorders are the most common causes of disability (WHO, 2008), and some of them can be easily corrected (e.g. hearing loss and vision loss), special measures should be taken to ensure access to health and education interventions of these populations.

A third step, the one where the array of small wins expands, and it becomes more challenging to negotiate, are changes in the *socio-political* climate of the country. Many times, changes are demanded and claimed on a social level and then translated into legislation, so small wins strategy can work with any type of level-initiated change. For example, according to the United Nations Development Program (UNDP), the literacy rate for women with disabilities is as

low as 1% (USAID, 2009). Sen (1999a) comments on ways on how women's education decreases mortality rates of children under five years old, through directly and indirectly influencing the welfare of their children by influencing family decisions. Another example is provided by Kristof and Wudunn (2009), who suggest that investment in education has the potential to deter terrorism in general. Indeed, many acts of violence against people with disabilities are taking place in a context of lack of information and prejudice. Provision of education, from primary to tertiary education, and employment training would provide the incremental changes in society. It may take from several years to several generations for widespread changes to occur and for small wins to be made, but the smaller the degree of provided education exposure, the smaller the changes in society and the longer the fight against discrimination.

When implementing small wins, the need for collaboration and ecological interaction is crucial. Uneven developments and contributions from different communities call for a strong need for specialization for knowledge of tools and methods in the field of disabilities and special education, as well as the use of multi-functional expertise of teams for addressing heterogeneous content (e.g., infrastructure, behaviors and attitudes) and heterogeneous user needs to be context-sensitive. Local and global expertise in applying the knowledge of best practices to the reality of different cultures and subcultures, as well as a shift of investment in people with disabilities and people who care for the disabled, will contribute to long-term commitments to improve their lives.

Finally, the incremental progress proposed by the small wins strategy can follow or precede systemic changes, therefore the time for change is *anytime*. This strategy calls for all people to be activists in promoting their ideas of equity and opportunity development. This

method calls for a re-examination of problems and of the processes of improving solutions. It requires constant translation of knowledge into practice and vice-versa, thus the involvement of all is encouraged, from researchers to practitioners, from parents to people with disabilities themselves, from institutions to governments. In a democratic environment, where freedom of expression is fostered, objectivity is not required, but obtained through multiple subjectivities. 'Small winners' need not only initiate change, but also persevere and fuel energy until their goal is achieved.

In closing his chapter on "Pathologies of epistemology", Gregory Bateson (1987) urged for a change in mentality: "I believe that this massive aggregation of threats to man and his ecological systems arises out of errors in our habits of thought at deep and partly unconscious levels" (p. 495) and identified the utmost important courses of action that would allow system regeneration: we should start "first, to achieve clarity within ourselves; and then to look for every sign of clarity in others and to implement them and reinforce them in whatever is sane in them" (p. 495). But this 'sanity' is rooted in the moral and ethical vision of human rights! Bateson further recommended the infusion of Oriental philosophy and the young people's ideas into the established system(s), or what it can be called non-traditional patterns of thinking. People with disabilities, especially the young people, would belong to this category, since they would constitute a relative novelty for scientific fields and social communities where they were previously not included in. I believe that in order to change mentalities, we need to understand the interdependence of individuals and nations, especially in the present age of globalization, because no single man or nation can survive in isolation from various ecological spheres.

The small wins theory is an approach to change that has the potential to bring about huge changes, looking for what's working in practice and building on the proven successes. Following

are several small steps that states, human rights groups, and communities *can* and *should* take to improve the treatment and empowerment of people with disabilities, through implementing the small wins strategy. Boylan (1991) lists several directions of action: (a) encouraging educators and local employers to meet people with disabilities and negotiate employment and employment training; (b) support the development of appropriate technology that would assist people with disabilities obtain access to education and participate in the educational process; (c) start community-based rehabilitation programs; (d) raise awareness about the connection between disability and poverty; and (e) assisting parents in developing informed and constructive attitudes about disabilities and extract from their children's disabilities the potential for development. To this list, I add several other directions that emerge from the present study: (a) adopt human rights regional and international norms into local legislation; (b) eradicate poverty; (c) stop gender discrimination; (d) restructure and rethink of the education for people with disabilities; (e) invest in infrastructure to allow the implementation of legislation to protect people with disabilities; (f) invest in health, education, and employment, especially for girls and women with disabilities; (g) invest in technological advances to facilitate daily activities ; (h) involve researchers and practitioners; (i) involve government, non-governmental, profit, media, and any organizations, as well as parents, teachers, administration personnel; (j) develop constructive attitudes regarding people with disabilities; and (k) advance public policy, encourage data collection and research in relation to disability issues and disability rights. I trust that the small wins strategy becomes an empowering tool that will bring about positive change for people with disabilities through awareness, prevention, trans-disciplinary dialogue, and experimentation, nonetheless remembering that the time for change is anytime and that it is important to persevere until the goals have been reached.

Recommendations for future research may include: (a) an increase the body of research about attitudes towards disabilities in countries and regions of the world outside the Council of Europe, and, hence, not tackled in this study; (b) statistical analyses on possible aggregations of empirical data that would render a viable Human Rights Index or a Disability Rights Index; (c) analyses on statistical correlations between population attitudes and behaviors and human and disability rights issues; (d) the adoption of different mixed methods designs to reveal patterns of antecedents and consequences of attitude or behavior changes towards people with disabilities; (e) further interpretive work on disability rights matters; (f) further refinement of theoretical background and practical implications of the ecological framework for disabilities and special education; and (g) practical strategies for improvement of the quality of life for people with disabilities that employ the small wins strategy.

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## Appendix A

### Curriculum Vitae

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#### EDUCATION

<b><u>Doctor of Philosophy (Ph. D.)</u></b>	August 2011
<i>University of Illinois at Urbana-Champaign, United States, Global Studies in Education; Graduate Minor in European Union Studies; Graduate Interdisciplinary Minor in Gender Relations in International Development Dissertation Title: From the Human-Rights-Based Approach to an Ecological Approach on How to Achieve Successful Inclusion in International Disability Education</i>	
<b><u>Education Specialist (Ed. S.)</u></b>	2002- 2006
<i>University of Georgia, Athens, Georgia, United States, Department of Special Education; Autism Spectrum Disorders and Psychology specializations</i>	
<b><u>Master of Science (M.S.)</u></b>	2000-2002
<i>University of Bucharest, Bucharest, Romania, Department of Psychology and Special Education</i>	
<b><u>Bachelor of Science (B.S.)</u></b>	1996-2000
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<b><u>Arts Associate (A.A.)</u></b>	1995-1998
<i>Bucharest Architecture and Systematization Community College, Interior Decorations Dept.</i>	

#### CONSULTING EXPERIENCE

CLASS Rater, Woodcock-Johnson administrator, and Consultant	2010-Present
Editorial Advisory Board consultant	2010
Guardian, Athens, GA	Summer, 2005
Freelance Tutor, Bucharest, Romania	1996-2002

#### TEACHING AND WORKING EXPERIENCE

<u>University of Illinois at Urbana-Champaign Positions:</u>	
• Graduate Assistant for Global Studies in Education (GSE)	2007-Present
• Organizer of GSE On-Campus Seminar Series	2008- 2010
• Student Mentor in the Global Studies in Education Division	2008-2009
• Graduate Assistant with the Teaching Critical Thinking for Teachers (TCT)	2008-2009
• Assistant Editor for the Education Theory Journal, Education Policy Dept.	2009-2010
• Grader for the School of Labor and Employment Relations	2008-Present
<u>University of Georgia Positions:</u>	
• Instructor for graduate and undergraduate level courses	2004-2005
• Supervisor of student teachers enrolled in UGA practicum classes	2003-2004
• Research Assistant in Special Education Department	2002-2003
• Teaching Practicum in Special Education	2002-2005
<b><u>Special Education Teacher in Romania and USA</u></b>	2005-2006 and 2001-2002
<b><u>Editor</u></b> at Mediafax, Romania	1998-2001

#### LANGUAGE SKILLS

Romanian (native language), English (near-native fluency), French (limited proficiency), and Spanish (basic proficiency).

#### HONORS AND AWARDS

- Hardie Conference Travel Award, University of Illinois, Bureau of Educational Research Endowment and Charles Dunn Hardie - \$600 **2009**
- Society for the History of Children and Youth (SHCY) - \$300 **2009**
- CEC Mini-Grant 2006, GA - \$200 **2006**

#### MEMBERSHIPS

- Society for the History of Children and Youth (SHCY) **2009-2010**
- American Educational Research Association (AERA) **2007-2008**
- CEC - Council for Exceptional Children (DD and DISES) **2002-2006**
- Autism Romania – Association of Parents with Children Diagnosed with Autism **2003**
- RENINCO Association Romania – National Network of Information and Cooperation for Integration of Children with Special Needs **2000-2007**

#### CERTIFICATIONS

- Georgia Educator Certificate – Level 5; issued by the Georgia Professional Standards Commission. **2005-2015**
- Psychotherapy Diploma issued by the Romanian Association of Psychologists, allowing provision of experientialist therapy sessions under the supervision of a licensed psycho-therapist
- Certificate of Translator (English/Romanian) - issued by the Ministry of Education and the Mediterranean Civilization for Education and the Association of Culture, Bucharest **1998**

#### ADDITIONAL INFORMATION

- *Travel*: Romania, several countries in Europe (France, Germany, Italy, Monaco, Austria, Turkey), and the United States.
- *Interviewed by The Illinois International Review*: Walker, G. (2008). International Perspectives: What are your impressions of the U.S. Presidential election process? *The Illinois International Review*, Fall 2008. Available at <http://www.ips.uiuc.edu/ilint/mt/iir/online/2008/08/perspectives.html>
- *Translated Materials (English into Romanian)*: Aiscow, M. & Tweedle, D. A. (2001). *Early Learning Skills Analysis*, RENINCO Romania Association Publishing House. Various articles in the field of special education, published by RENINCO Romania Association Publishing House.
- *Technology Skills*: Elluminate, Moodle, Compass, WebCT, Microsoft Word, Microsoft Excel, Microsoft PowerPoint, PC Computer, Apple Computer.

#### PUBLICATIONS

##### Books:

- Walker, G., & Araya, D. (2011). *Global Citizenship in Context*. Forthcoming.  
 Araya, D., & Walker, G. (2011). *Open Source, Open Access, Open Education*. Forthcoming.

##### Articles, Chapters, Book Reviews:

- Railean, E., & Walker, G. (2011). Open distance learning: Achievements and expectations. In D. Araya & G. Walker, *Open Source, Open Access, Open Education*. Forthcoming.
- Walker, G. & Gheorghiu, D. (in press). Displacement and Shift in Romania's Identity: Towards European and Global Citizenship. In G. Walker & D. Araya (Eds.), *Global Citizenship in Context*. Sense Publishing.
- Walker, G., & Popova, A. (in press). *Were Highly Democratized and Developed States Quicker to Ratify the United Nations Convention on the Rights of the Child? A Global Analysis*.
- Walker, G. (2011). De-institutionalization in Romania: Education, Human Rights, and the Ecology of Disabilities, *Journal of Disability Policy Studies*, XX(X), 1-10. doi: 10.1177/1044207310394853
- Walker, G. (2010). Building 'Special Capital' for Entrepreneurial Development: Special Populations as Human Capital in the Context of Global Development. *Policy Futures in Education*, 8(6), 697-708. doi: 10.2304/pfie.2010.8.6.697
- Walker, G., Fitzpatrick, M., & Rakochy, A. (2010). Critical Theory: A Book Review Symposia. *Journal for Critical Education Policy Studies*, 8(1), pp. 448-459. (Peters, Michael, Lankshear, Colin, & Olssen, Mark. (2003). *Critical Theory and the Human Condition: Founders and Praxis. Series: Counterpoints: Studies in the*

- Postmodern Theory of Education*, Vol. 168. New York: Peter Lang Publishing, Inc. Pp. viii + 288. ISBN 0-8204-5168-1. \$ 29.95 (softcover.) Retrieval from <http://www.jceps.com/PDFs/08-1-16.pdf>
- Thayer, J., & Walker, G. (2010). State and Society in Post-Socialist Economies: A book review. John Pickles, State and Society in Post-Socialist Economies. Studies in Central and Eastern Europe. New York: Palgrave Macmillan, 2008. xvi +281 pp., ISBN-13: 978-0230522145. *Europe-Asia Studies*, 62(4), pp. 725-746. \*
- Walker, G. (2010). Rechanneling Disruptive Behaviors: Towards Epiducation and Ecoducation. In Alexandra M. Columbus (Ed.), *Advances in Psychology Research, Volume 67*. Nova Science Publishers. ISBN-13: 9781607418177.
- Walker, G. (2010). Inclusive Education in Romania: Policies and Practices in Post-Communist Romania. *International Journal of Inclusive Education*, 14(2), 165-181. First published on September 2009 on iFirst. doi: 10.1080/13603110802504192
- Walker, G. (2009). Post-socialist Working Class in Romania: A Book Review. (David A. Kideckel, Getting by in Post-Socialist Romania: Labor, the Body and Working-Class Culture. Bloomington & Indianapolis: Indiana Press University, 2008. xii + 266 pp., ISBN-13: 978-0253219404.) *Europe-Asia Studies*, 61(9), pp. 1659-80. \*
- Walker, G. (2008). Policy, Experience, and Change in Inclusive Education: A Book Review. *Remedial and Special Education*. (Barton, Len, & Armstrong, Felicity. (2007). *Policy, Experience and Change: Cross Cultural Reflections on Inclusive Education*. Dordrecht, The Netherlands: Springer. Pp. xv + 199. ISBN 1-4020-5118-2. \$159.00 (hardcover). ) Available at <http://rse.sagepub.com/cgi/rapidpdf/0741932508324400v1.pdf>
- Walker, G. (2008). Global Digital Connect and Disconnect through Open Education: Open Source in Romania and the Promise of Open Education. In M. A. Peters and R. G. Britez (Eds.) *Open Education and Education for Openness* (79-94). Rotterdam, The Netherlands: Sense Publishers.
- Walker, G. (2008). Overrepresented Minorities in Special Education in the United States and Romania: Comparison between African-American and Roma Populations in Disability Studies. *Research in Comparative and International Education Journal*, 3(4), pp. 394-403. doi: 10.2304/rcie.2008.3.4.394. Available at <http://dx.doi.org/10.2304/rcie.2008.3.4.394> \*
- Walker, G., Ramirez, J, Hatchett, C., Kwak, L., Hubbard, W., Murphy, S., Manning, L., Costello, A. (2008). *Election 2008: Special Education Views of Barak Obama and John McCain*. Available at <http://election2008specialeducation.blogspot.com>
- Walker, G. (2008). Admission and Graduation Requirements for Special Education Doctoral Programs at Top 20 American Universities. *Journal on Developmental Disabilities*, 14(2), 16-25. Available at <http://www.oadd.org/publications/journal/issues/vol14no2/walker.htm>
- Walker, G. (2008). Admission Requirements for Education Doctoral Programs at Top 20 American Universities, *College Student Journal*, 42 (2), 357-366. Available at [http://findarticles.com/p/articles/mi\\_m0FCR/is\\_2\\_42/ai\\_n25454143/pg\\_1?tag=artBody:col1](http://findarticles.com/p/articles/mi_m0FCR/is_2_42/ai_n25454143/pg_1?tag=artBody:col1)
- Walker, G. (2008). Constant and Progressive Time Delay Procedures for Teaching Children with Autism: A Literature Review. *Journal of Autism and Developmental Disorders*, 38(2), 261-75. Available at <http://www.springerlink.com/content/1682710076n68305/> Structured abstract available at <http://www.crd.york.ac.uk/CRDWeb/ShowRecord.asp?ID=12008103401> \*
- \* These articles are featured in the Science Citation Index (ISI Web of Science)

## PRESENTATIONS AND CONFERENCES

- “De-institutionalization in Romania: Education, Human Rights, and the Ecology of Disabilities”. Society for History of Children and Youth, Panel presentation “Placing the Hard-to-Place Child: Children with Disabilities and Special Needs in the History of Adoption, Foster Care, and Orphanages”. July 9-12, 2009, University of California at Berkeley.
- “Introduction in Romanian Culture and Language”, Global Fest 2009, Urbana High School, 14 March, 2009, Urbana, Illinois.
- “Overrepresented Minorities in Special Education in the United States and Romania: Comparison between African-American and Roma Populations in Disability Studies”, University of Illinois Student Interdisciplinary Conference, Poster Session, 26 January, 2009, Urbana, Illinois.
- “Overrepresented Minorities in Special Education: Comparison between African-American and Roma Populations in Disability Studies”, Global Studies in Education On-Campus Seminar, 26 September, 2008, Urbana, Illinois.
- “Romania’s accession to the European Union”, European Union Center: Romanian Panel Presentation, 22 February, 2008, Urbana, Illinois.

- “Two Response Prompting Procedures Used to Teach Students with Autism Spectrum Disorders”, Georgia Graduate Student Interdisciplinary Conference, 1 April, 2006, Athens, Georgia.
- “Research on the Use of the Constant and Progressive Time Delay Procedures with Students with Autism”, Georgia Council for Exceptional Children, State Conference, 20-21 January, 2006, Savannah, Georgia.
- “Educational Survey Regarding the Integration of Mentally Challenged Students from Special Schools into Regular Schools in Bucharest”, Bucharest Special Education Teacher Conference, Special School No. 9, 23 May 2002, Bucharest, Romania.