

## **Advocacy for Improved Special Education in Trinidad and Tobago**

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# EXECUTIVE SUMMARY

## INTRODUCTION

The purpose of the project is to develop a plan for the United Way of Trinidad and Tobago to advocate for improved special education programs in public school as a means of reducing high school drop-out rates. The outcome of the project will be the development of an advocacy strategy for the UWTT to advocate for improved special education.

At present the public schools in Trinidad and Tobago are unable to provide sufficient support for students with special needs and difficulty learning which presents a social justice, equality and human rights issue (Barton & Armstrong, 2007, Paul, 2011). In 2012, Blackman, Conrad and Brown estimated that 25% of school aged students required additional learning support. In the 2014, a Community Needs Assessment Report conducted by the UWTT, demonstrated that lack of special education supports for students with learning difficulties as well as undetected disabilities are a root cause of students dropping out of school (Adams-Padia, 2014). Students with special education needs are defined as students with greater difficulty learning than the majority of their peers and students who have characteristics that affect their ability to learn (Williams, 2007). Students with special education needs require modifications and adaptations in teaching methods, curriculum, strategies and structures to learn effectively (Williams, 2007).

Education is responsible for preparing students to be active members of society; consequently where exclusion exists, societal attitudes and discrimination towards persons with special needs persist (Conrad, Paul, Bruce, Charles, & Felix, 2010). The education system in Trinidad and Tobago is based on the British colonial rule of the 1900's, which was inherently elitist; designed to filter and segregate students based on academic performance and examinations (De Lisle, Seecharan, & Ayodike, 2010; Lam, 2011; Libert, 2007;). An inclusive education system presents an opportunity to model democracy, inclusion and social justice to broader society while reducing inequality in education outcomes for marginalized students (Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, Seecharan, & Ayodike, 2010). Waitoller and Artiles (2013) posit that inclusive education can create access and participation in quality education, acknowledgement and appreciation of differences and advance the cause of marginalized groups in society.

While the Ministry of Education in Trinidad and Tobago has articulated a commitment to improving education for vulnerable students, interventions have been unsuccessful at improving the situation and marginalized students continue to fall through the cracks (Barton & Armstrong, 2007). The barriers to education reform and support of vulnerable students include, the tradition of an exclusive and elitist school system, weak policy and implementation strategy, lack of public support, ineffective leadership at all levels, scarcity of resources, dependency on external funding, lack of cohesion among governmental ministries, policy decisions not translated at the school level, lack of stakeholder involvement in policy creation, inflexible curriculum delivery,

lack of teacher training and skill and teacher resistance (Armstrong, Armstrong, Lynch, & Severin, 2005; Blackman, Conrad, & Brown, 2012; Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, 2009). Additionally, there is a lack of societal awareness and sensitivity towards persons with disabilities and special needs in Trinidad and Tobago, which combined with competitive, elitist, colonial education traditions makes education reform challenging (Conrad, Paul, Bruce, Charles, & Felix, 2010; Peters et al., 2008; Paul, 2011; De Lisle, Seecharan, & Ayodike, 2010).

Educational reform and improving special education requires early intervention and assessment for disabilities, professional development and training for teachers and administrators, infrastructure and facility improvements, local research, resource investment and the allocation of support staff services (Armstrong, Armstrong, Lynch, & Severin, 2005; Peters et al., 2008). Furthermore, public education and socialization can assist in addressing discrimination towards students with special needs by building awareness and promoting inclusion within the broader society (Peters et al., 2008). Finally, policies and legislation developed collaboratively at the national level will ensure that policies and their implementation are relevant in context, culture and bring about sustainable educational reform (James, 2010). In summary, education reform in Trinidad and Tobago is a means of addressing social justice issues and discrimination of persons with disabilities but it requires collaboration and cooperation between government leaders, administrators, educators, parents, students, nonprofit and the private sector (Conrad, Paul, Bruce, Charles, & Felix, 2010).

Advocacy is a means of challenging social inequalities to bring about social change by influencing the decisions and policies of those with power while engaging and educating the broader community (Donaldson, 2008; Mellinger, 2014). Almog-Bar and Schmid, (2013) further describe advocacy as a means of providing a voice to marginalized persons, empowering such individuals and improving the quality of life for a specific population. Advocacy activities include lobbying, educating, skill building, mobilizing and organizing populations, researching and analyzing social justice issues, letter writing, protesting, boycotting, petitioning, building relationships, convening and facilitating (Donaldson, 2008; Mosley, 2009).

Research identifies several potential advocacy strategies, ranging from cooperative to antagonistic. Collaborative strategies, where agreement exists between political institutions and civil society as to the reform, requires stakeholders work collaboratively to bring about the desired change. Modeling advocacy strategies or pilot programs are examples of collaborative advocacy and are utilized to demonstrate successful alternatives or solutions to complex issues (Fox, Helweg, & Hansen, 1997). Furthermore, organizations often undertake educational advocacy strategies whereby they provide research, analysis and data to government entities in hopes of influencing priorities, policies and decision-making (Fox, Helweg, & Hansen, 1997). Administrative advocacy includes meetings with government officials, participating on advisory and planning committees, providing information to government agencies and networking with government personnel (Almog-Bar & Schmid, 2013).

Outsider advocacy tactics are a more antagonistic form of advocacy, which include public education, use of mass media, protests and boycotts to bring about system reform (Almog-Bar & Schmid, 2013). More aggressive advocacy strategies include persuasion advocacy, the mobilization of mass support for an issue through education, awareness building and the development of coalitions, which can force the hand of political institutions to adopt the desired reform recommendations (Fox, Helweg, & Hansen, 1997). Legislative advocacy as defined by Almog-Bar & Schmid (2013) include strategies such as lobby for policy reform, testifying at hearings, producing research reports, letter writing and or calling campaigns. E-advocacy is a developing trend, which has the ability to engage large numbers of stakeholders across geographic boundaries to influence decision-making on a global level.

Effective advocacy campaigns include a combination of activities that produce changes at the legislative level while empowering constituents and building public awareness of salient social issues. These advocacy activities can include setting up meetings between government officials, stakeholders and constituents, providing policy recommendations to government entities, empowering and supporting constituents as self-advocates, generating media attention on social justice issues and building or lending support to coalitions, and enhancing public awareness of issues facing marginalized populations (Almog-Bar & Schmid, 2013)

Advocacy can produce outcomes, which are transformational, developmental or instrumental (Fox, Helweg, & Hansen, 1997). Transformational outcomes involve constituent empowerment whereby, marginalized populations develop the capacity to identify and address issues that impact them (Fox, Helweg, & Hansen, 1997). Developmental advocacy involves strategies that strengthen civil society and encourage democracy (Fox, Helweg, & Hansen, 1997). Instrumental advocacy as defined by Fox, Helweg, and Hansen (1997), influences policy producing macro-level transformations. Fox, Helweg, and Hansen (1997) posit that in most cases, citizen empowerment and strong civil society are prerequisites for instrumental advocacy or policy level changes. Conversely, instrumental advocacy strategies that influence policy level changes enhance citizen empowerment and civil society.

Finally, an organization that wishes to undertake advocacy activities must have the appropriate organizational capacity, skills, expertise and resources (Almog-Bar & Schmid, 2013). Furthermore, while challenging, evaluation and assessment of an organizations advocacy activities is essential to assess the impact of initiatives, improve advocacy effectiveness, demonstrate value of advocacy activities to stakeholders and make educated decisions about resource allocation for advocacy initiatives (Almog-Bar & Schmid, 2013).

## LITERATURE REVIEW

The literature review will examine the following themes; academic research focused on special education provision in the context in Trinidad and Tobago and advocacy strategies, outcomes and evaluation.

Students with special education needs are defined as students with greater difficulty learning than the majority of their peers and students who have characteristics that affect their ability to learn (Williams, 2007). Students with special education needs require modifications and adaptations in teaching methods, curriculum, strategies and structures to learn effectively (Williams, 2007). Lack of appropriate educational support services contributes to students with special needs exiting the school system prematurely, which ultimately, impacts their ability to be engaged citizens as adults (Barton & Armstrong, 2007). Special schools exist to deliver education to students with disabilities; however their cost can be excessive. The costs associated with segregated education adversely affect the preparation of students for integration into broader society. Inclusive education has proven to be a more desirable education approach and research indicates that special needs students achieve higher academic success in integrated settings (Armstrong, Armstrong, Lynch, & Severin, 2005; Blackman, Conrad, & Brown, 2012; Paul, 2011). Inclusive education offers a means of transforming the education system to respond to all learners needs, facilitating education for marginalized students (Conrad, Paul, Bruce, Charles, & Felix, 2010; Williams, 2007).

The literature review presents the challenges and barriers to improving special education programs in schools and the benefits of inclusive education approach. Students with special education needs are marginalized in Trinidad and Tobago, which present as social justice issue. Education reform and improvements to special education requires holistic, multi-level solutions, which includes, students, educators, administrators and relevant government entities.

Advocacy is defined as activities that challenge social justice issues in an attempt to bring about social change (Donaldson, 2008; Mellinger, 2014). Almog-Bar and Schmid, (2013) further describe advocacy as a means of providing a voice to marginalized persons, empowering such individuals and improving the quality of life for a specific population. Advocacy activities include lobbying, educating, skill building, mobilizing and organizing populations, researching and analyzing social justice issues, letter writing, protesting, boycotting, petitioning, building relationships, convening and facilitating (Donaldson, 2008; Mosley, 2009). A review of advocacy research suggests there is agreement on the basic building blocks required for the development of more formal advocacy participation which include dedicated staff and resources, stakeholder involvement, organizational leadership, diversified funding, organizational lifecycle, and participation in coalitions (Almog-Bar & Schmid, 2013; Mellinger, 2014; Mosley, 2009). Many human service organizations actively engage in advocacy to support issues and interests of their constituents and to further their organizational mission (Mulholland, 2010). However, contrary to organizations focused specifically on advocacy, most human service nonprofits

undertake advocacy in addition to their core activities. Unfortunately advocacy is often done in an inconsistent, unstructured and under-resourced way (Donaldson, 2008; Mellinger, 2014, Mosley, 2009). Mellinger (2014), Mulholland (2010) and Mosley (2009) posit that the lack of planned and structured participation in advocacy impacts on its ultimate effectiveness in bringing about social and policy change.

Advocacy is a means of addressing social justice issues, empowering marginalized populations and educating society on salient social challenges. There are many types of advocacy ranging from collaborative to antagonistic. Choosing an advocacy strategy must be based on desired outcomes, organizational capacity, and vision.

## METHODOLOGY AND METHODS

The project utilizes a qualitative research methodology. Qualitative research develops an understanding of the interaction between variables and can inform recommendations for intervention development and strategy implementation (Operario, 2008). As the project outcome was the development of an advocacy strategy and implementation recommendations, qualitative research was considered an appropriate approach.

The method for the project was key informant interviews with organizations and individuals currently advocating for improved special education in Trinidad and Tobago. Semi-structured interviews were conducted with organizations and individuals undertaking or involved in special education and/or advocacy for special education in Trinidad and Tobago, to contextualize the advocacy experience in Trinidad and Tobago, establish best practices and identify potential advocacy coalitions specific to special education.

## FINDINGS AND DISCUSSION

The primary research findings of the project demonstrate that there are several factors that enhance and limit advocacy in the context of Trinidad and Tobago. Lack of research on special education, fragmentation between relevant nonprofits, lack of funding for advocacy and lack of societal acceptance of special needs persons are factors that limit advocacy activities in Trinidad and Tobago. Meanwhile, expansion of social media, the ratification of the United Nations Convention on the Rights of Persons with Disabilities and the recent Consultation on Education in Trinidad and Tobago present windows of opportunities or leverage points for which to start an advocacy campaign to improve special education. At present most of the organizations interviewed undertake advocacy through service provision, providing services to improve the capacity of special needs students and families and empowering them to become self-advocates. As well, the organizations and individuals interviewed attend special events and utilize social media to promote special needs rights and issues. Few of the interview respondents had experience with policy advocacy, which might be related to the lack of coalition strength and effectiveness.

The advocacy framework developed through synthesis of primary research data and the literature review outlines steps, stages, processes and outcomes in developing an effective advocacy campaign for improving special education in Trinidad and Tobago. The framework suggests that an effective advocacy campaign should begin at the transactional level, providing services to special needs students, families, teachers and administrators, working at the micro-level to empower, support and train stakeholders and marginalized populations. Transactional advocacy is an appropriate starting point as it provides families, teachers and other early adopters with skills and capacity to share their stories and experiences and address issues on a smaller scale until macro-level change occurs. The subsequent step involves public education and socialization of the general public with regards to special needs issues and special education options, building mass support for inclusive education and education for all. The developmental advocacy stage should also include research on viable education models, policies required, implementation strategies as well as development of coalitions for action. Once, mass support for education reform is created policy advocacy will be more successful as government officials will be compelled to respond to concerns and social justice issues that exist due to lack of support for special needs students. Instrumental advocacy address system level barriers to education reform and as such should include, relevant stakeholders, local research, policy development, implementation monitoring and training programs to support reform initiatives.

#### OPTIONS TO CONSIDER AND RECOMMENDATIONS

Four potential advocacy strategy options are presented to the UWTT for improving special education in Trinidad and Tobago. The first option is public awareness campaign highlighting the issues that exist for special needs students in schools and the consequences of not addressing special education in Trinidad and Tobago. The second potential advocacy strategy is for the UWTT to provide funding for an organization to undertake advocacy for improving special education in Trinidad and Tobago. This could include funding organizations that provide services to improve special education, build public awareness, or advocate for policy development. The third potential strategy is for the UWTT to conduct research, provide funding for research by an outside organization, and or present the UWTT collective impact project findings to the Ministry of Education whereby enhancing decision-making in terms of education reform in Trinidad and Tobago. The final option for consideration is for the UWTT to join an existing coalition or create a coalition for advocating for improved special education.

The UWTT collective impact pilot project itself is a form of advocacy through research, which can be shared with government agencies, like the Ministry of Education, and guide education reform. Once the collective impact pilot project is completed, the development of a public awareness campaign in collaboration with allies/partners was selected as the most appropriate advocacy strategy for improving special education in Trinidad and Tobago, aligning with the resources and capacity of the UWTT. It was decided that utilizing the UWTT collective impact pilot project as a model, sharing the success of the project as a means of improving special education in a specific community, would be the most effective and non-confrontational

foundation on which to build a public awareness campaign. In this way the UWTT can share its successes, and achievements as well as present viable strategies to address special needs education as well as other interventions implemented to reduce high school dropout rates. The campaign would include posts on social media, a short video as well as a public service announcement on local television. Cross-sector collaboration is essential to the collective impact project and as such collective engagement would be encouraged in the development of the campaign as well as creating exposure and visibility.

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## 1.0 INTRODUCTION

The United Way of Trinidad and Tobago (UWTT) is a national, not for profit organization that has traditionally focused on the mobilization of human, financial and physical resources to support non-governmental organizations address social challenges (United Way - Trinidad and Tobago, Overview n.d.). UWTT secured funding to initiate a collective impact pilot project to address high school dropout rates (Adams-Padi, 2014). Kania and Kramer (2011, p. 39) describe collective impact as cross-sectorial collaboration with a commitment to establishing mutual goals, developing evaluation mechanisms and monitoring progress. The development and implementation of various strategies bringing about long-term social change is the objective of a collective impact approach. UWTT has identified advocacy as a strategy for their collective impact initiative but up to this point the organization has limited experience in this area. The purpose of the project is to develop a plan for the United Way of Trinidad and Tobago to advocate for improved special education programs in public school as a means of reducing high school dropout rates.

### 1.1 DEFINING THE PROBLEM

In 1984, the National Survey of Handicapped Children and Youth in Trinidad and Tobago estimated that 16% of the school aged population required special education supports (Barton & Armstrong, 2007, Williams, 2007). At that time, approximately 27,000 students in the school system were without suitable learning supports (Barton & Armstrong, 2007). In 2012, Blackman, Conrad and Brown estimated that 25% of school students required additional learning support. In the 2014, a Community Needs Assessment Report conducted by the UWTT, demonstrated that lack of special education supports for students with learning difficulties as well as undetected disabilities are a root cause of students dropping out of school (Adams-Padia, 2014). These findings corroborate Wells (1990) as cited in Adams-Padia (2014) who concluded that student disability, low ability levels and system neglect of different learning styles are contributing factors to school dropout rates. All of these findings were consistent with the Trinidad and Tobago National Task Force on Education Report from 1993-2003 which found that the education system is not currently meeting the needs of vulnerable and special needs students (Barton & Armstrong, 2007). While government commitment to improving education for vulnerable students has been articulated, interventions have been unsuccessful at improving the situation and marginalized students continue to fall through the cracks (Barton & Armstrong, 2007)

### 1.2 PROJECT CLIENT

UWTT is a national, not for profit organization that has traditionally focused on the mobilization of human, financial and physical resources to support non-governmental organizations to address social challenges (United Way Trinidad and Tobago, 2015). The organizational vision of "being a moving force in developing and sustaining a civil society" with emphasis on education, youth

development and family life, aligns with the UWTT's innovative collective impact pilot project, which seeks to address school dropout rates (United Way Trinidad and Tobago, 2015). UWTT is committed to cross-sector collaboration to address social issues and improve the quality of life in Trinidad and Tobago (United Way Trinidad and Tobago, 2015). The UWTT will utilize the advocacy implementation strategy as a strategy of the collective impact pilot project.

The UWTT was incorporated in 1999 and modeled after the Canadian United Way (United Way Trinidad and Tobago, 2015). As such, the primary function of the UWTT has been to raise charitable funds to support not for profit organizations in the provision of social services and programs that address social issues. Since 2004, the UWTT has distributed \$37 million (TT dollars) to over 60 organizations in an effort to address social issues such as family and youth development and education (Adams-Padia, 2014). As part of the distribution of funds, the UWTT assess project sustainability and impact on issues related to education, youth development and family life (Adams-Padia, 2014). Furthermore, the UWTT engages volunteers to build community and enhance quality of life in Trinidad and Tobago (Adams-Padia, 2014).

Collective impact initiatives are being incorporated into United Ways worldwide as a means of creating cross-sector collaboration to solve complex social problems (Planting the Seeds of Innovation, 2014). In 2012, the UWTT obtained funding to initiate a pilot project that would utilize a collective impact model to address school dropout rates (Planting the Seeds of Innovation, 2014). Kanis and Kramer (2011) describe collective impact initiatives as:

Long-term commitments by a group of important actors from different sectors to a common agenda for solving a specific social problem. Their actions are supported by a shared measurement system, mutually reinforcing activities, and ongoing communication, and are staffed by an independent background organization (p. 39).

Advocating for improved special education programs and support for vulnerable learners in public schools is a long-term strategy of the UWTT collective impact pilot project (M. Adams-Padia, personal communication, September 15, 2014). Advocacy attempts to challenge social inequalities to bring about social change by influencing the decisions and policies of those with power while engaging and educating the broader community (Donaldson, 2008; Mellinger, 2014). Research has found that most advocacy practices of human service nonprofit organizations are undertaken on an ad hoc and inconsistent basis (Donaldson, 2008; Mellinger, 2014; Mosley, 2009). UWTT requires support in the development of an advocacy strategy to address the lack of special education programs in public schools. Mellinger (2014) and Mosley (2009) posit that an institutionalized, formal advocacy program within an organizational structure can greatly enhance the success of advocacy efforts.

### 1.3 PROJECT OBJECTIVES

The deliverables of the project will include a literature review of special education in Trinidad and Tobago as well as a review of current advocacy research. Recommendations based on the research and interview findings will guide the selection of an advocacy strategy for the UWTT. The project findings will be presented in a written report and will also be presented to the UWTT staff and board of directors.

The main research question of this project is:

*How can the United Way of Trinidad and Tobago (UWTT) advocate for improved support for students with special needs and difficulty learning?*

Secondary questions are:

*What advocacy method(s) will be most effective in producing change in the public school system special education programs?*

*Who should be the target of the UWTT advocacy efforts?*

The outcome of the project will be the selection of an appropriate advocacy strategy for the UWTT to undertake to improve special education in Trinidad and Tobago.

### 1.4 REPORT OUTLINE

The remainder of the report is made up of seven chapters. Chapter 2 provides a background to the education system and special education provision in Trinidad and Tobago. The literature review is presented in Chapter 3 and provides an in depth examination of the special needs populations, barriers to special needs education, and reform efforts as well as advocacy strategies, outcomes and requirements. The methodology and methods for the primary research conducted is outlined in Chapter 4. Findings from the key informant interviews are presented in Chapter 5 and discussion and analysis of the findings are expanded in Chapter 6. Four options to consider are provided in Chapter 7 along with the final recommendation and advocacy implementation plan for the UWTT. The report conclusion is provided in Chapter 8, followed by the project references and appendices.

## 2.0 BACKGROUND

Trinidad and Tobago is a twin island democratic republic located in the southern Caribbean (William, 2007). In 2011 census data, the population was estimated to be 1.3 million with a composition of 35.4% East Indian, 34.2% African, 22.8% mixed and 6.6% other or not stated (Ministry of Planning and Sustainable Development, Central Statistics Office, 2012). Trinidad and Tobago is one of the wealthier industrialized nations in the Caribbean due to its resources and economy based on oil and natural gas (James, 2010; Williams, 2007). While Trinidad and Tobago is multi-ethnic and relatively developed compared to other Caribbean countries, its history of slavery and colonialism has left a legacy of elitism and imbalances in power and privilege (James, 2010; Libert, 2007; Pedro & Conrad, 2006). The government of Trinidad and Tobago is focused on achieving developed nation status by 2020 and improvement and reform of the education system has been identified as a means to bring about the social and economic transformation required for achieving developed nation status (James, 2010; Williams, 2007).

### 2.1 EDUCATION SYSTEM AND EDUCATIONAL REFORM BACKGROUND

The education system in Trinidad and Tobago is based on the British colonial system and includes both public and private schools (De Lisle, Seecharan, & Ayodike, 2010; Williams, 2007). Government spending on public education between 1985 and 1994 was 4-5% of Gross Domestic Product with additional funding and direction provided by the Inter American Development Bank and the International Bank for Reconstruction and Development (De Lisle, 2009). Public or traditional schools are subdivided into government schools or government-assisted schools, which fall under the mandate of the Ministry of Education, Ministry of Science, Technology and Tertiary Education or in the case of Tobago schools the Tobago House of Assembly (Williams, 2010). Pre-primary, primary, secondary, post-secondary and tertiary make up the five levels of education in the country (Williams, 2010). The Ministry of Science, Technology and Tertiary Education oversees tertiary education in partnership with the private sector (Williams, 2010). In 2008, the education system in Trinidad and Tobago had 400,000 students with 460 primary schools, 150 secondary schools and 29 private and special schools in 8 districts (Peters et al., 2008).

Before 1962, education of the disabled population in Trinidad and Tobago was largely ignored and segregated by the state (Barton & Armstrong, 2007; Libert, 2007;). In the 1940's philanthropic and religious groups facilitated education for students with disabilities in separate special schools, (Conrad, Paul, Bruce, Charles, & Felix, 2010; Libert, 2007; Pedro & Conrad, 2006; Williams, 2010). Students with special needs attended institutionalized schools, which were partly financed by the government and through members of society (Williams, 2007). In 1966 a statement was included in the education act regarding the provision of education for special needs students (Conrad, Paul, Bruce, Charles, & Felix, 2010). From 1968 until 1993 marked the first era of education reform based on the Fifteen Year Plan, which focused on transforming the elitist, post-colonial school system (De Lisle, 2009). In 1980 institutionalized schools were integrated into the government education system and became known as special

schools, with their own boards of directors (Williams, 2007). In 1981, the Ministry of Education established a special education unit responsible for coordinating special education in the country, which marked a shift towards a rights-based attitude towards educating students with special needs (Pedro & Conrad, 2006; Conrad, Paul, Bruce, Charles, & Felix, 2010; Williams, 2007). Concerned parents, nonprofit organizations and educational leaders were strong advocates for educational reform including, appropriate allocation of resources and raising public awareness of issues affecting special needs students (Conrad, Paul, Bruce, Charles, & Felix, 2010). In 1982 an Advisory Committee for Special Education was developed and included representatives from nonprofits engaged in special education as well as government ministries (Williams, 2007). A report on a national survey of handicapped children and youth in Trinidad and Tobago was made available to the public (Williams, 2007). The national survey identified several issues affecting special needs children in Trinidad and Tobago including, the lack of inclusion of special needs students in regular schools, lack of special education training for teachers, inadequate curriculum, need to develop teaching methods and improve resources for special needs students and non-existent diagnostic testing and intervention (Williams, 2007). Publication of the survey results enhanced public awareness of special needs students, which coincided with increased demand for teacher education and training in special education (Williams, 2007).

Around 1989, the Canadian International Development Association (CIDA) and University of Manitoba facilitated the Sensitization Special Education Project; a series of workshops for teachers in Trinidad and Tobago on special education strategies (Pedro & Conrad, 2006; Conrad, Paul, Bruce, Charles, & Felix, 2010;). Special education and inclusion of special needs persons began to gain momentum and awareness. A partnership between The University of Sheffield, the Association for Special Education and the Trinidad and Tobago Unified Teachers Association resulted in the training of 300 teachers to be special educators in the country (Pedro & Conrad, 2006; Conrad, Paul, Bruce, Charles, & Felix, 2010). Up to that point, special education training was not readily available in Trinidad and Tobago (Pedro & Conrad, 2006). Additional, the Marge Report identified, for the first time, the percentage of students with special needs requiring support and intervention (Conrad, Paul, Bruce, Charles, & Felix, 2010). In 1990, the Ministry of Education amended its philosophy expounding a commitment to special needs students and their right to quality education (Conrad, Paul, Bruce, Charles, & Felix, 2010).

The second era of education reform took place between 1993 and 2003; based on the Education Policy Paper/White Paper which committed to providing accessible education to all children, regardless of gender, ethnicity, economic, social or religious background (Conrad, Paul, Bruce, Charles, & Felix, 2010; Peters et al., 2008; De Lisle, 2009; Williams, 2007). Initiatives in education reform in more recent years have focused on teaching techniques and supports required for all children to succeed in school (Williams, 2007). The asset-based approach to education further stated that every child has the ability to learn (Williams, 2007). As a result education reform in Trinidad and Tobago required adaptation to programs, curriculum and

teaching methods to suit the varying ability levels so all students could succeed and develop their innate capacity (Williams, 2007).

With the creation of the Diagnostic Program in 1999 and the founding of Students Support Services Division (SSSD) in 2004 the Education Policy Paper was developed under the Ministry of Education (Williams, 2007). Williams (2007) explained that the SSSD made up of guidance counselors, special education teachers and the school of social work who were to supervise special education and provide support to all students in the education system (Conrad, Paul, Bruce, Charles, & Felix, 2010). The SSSD has been responsible for planning and implementing inclusive education whereby students with disabilities would be integrated into regular schools rather than educated in segregated special schools (Williams, 2007).

Peters et al., (2008) and Booth (1996) as cited in Williams (2007) explain that the Trinidad and Tobago Ministry of Education endorsed UNESCO's definition of inclusion, which acknowledged the need to support diverse learner needs and limiting exclusion in the education systems. The UNESCO Salamanca Statement of 1994, appealed to governments worldwide, to improve education systems, implementing laws and policies that support inclusive education, as all children have the right to child-focused, inclusive education (Barton & Armstrong, 2007; Armstrong, Armstrong, Lynch, & Severin, 2005; Conrad, Paul, Bruce, Charles, & Felix, 2010;). In 2000, the Dakar Framework for Action declared that education is a fundamental right of all children and inclusive education is a key strategy for an Education for All approach (Peters et al., 2008). Trinidad and Tobago went further and signed the United Nations Convention on Rights of Persons with Disabilities in 2006, which advocated for inclusive schools (Conrad, Paul, Bruce, Charles, & Felix, 2010).

Inclusive education is a means of reducing marginalization, including students with special needs, builds communities and strong and cohesive societies. Inclusive education addresses the inequality that exists for many people in the Caribbean (Armstrong, Armstrong, Lynch, & Severin, 2005; Barton, Armstrong, 2007; Peters et al., 2008). While the government and ministries responsible for education in Trinidad and Tobago have attempted to improve special education supports, it is important to note that national policy and coinciding implementation strategy have been weak (Armstrong, Armstrong, Lynch, & Severin, 2005). As a result disabled students and students with learning disabilities are marginalized and incapable of participating or struggle to participate in the education system which is a root cause of students dropping out of school (Armstrong, Armstrong, Lynch, & Severin, 2005; Barton & Armstrong, 2007).

A survey and analysis of the special education in Trinidad and Tobago was undertaken by Miske-Witt and Associates in 2008. The report was provided to the Ministry of Education and SSSD for the development of a Seamless Education system through an inclusive education approach (Peters et al., 2008). The survey data presented a picture of special education issues in Trinidad and Tobago and provided a starting point for reform recommendations. The Miske-Witt and Associates report identified current initiatives being undertaken to address special

education issues. As well, the report outlined recommendations for the Ministry of Education to improve special education through an inclusive education model.

The Miske-Witt and Associates report included recommendations which sought to improve the education system so that all children could participate in an integrated Seamless Education model from early childhood to the tertiary level, specifically facilitating education for marginalized students which includes, dropouts, underachievers, students with difficulty learning, students with disabilities, gifted students, students with HIV and AIDS and students with emotional and behavioural difficulties (Peters et al., 2008; Williams, 2007). The transformation to inclusive education begins with mechanisms for assessment and early intervention for special needs students. Professional development for administrators and teachers and curriculum differentiation must come next (Peters et al., 2008). Monitoring and evaluation of draft policies related to inclusive education require an effective implementation strategy that is managed by personnel with the authority to enforce policy adherence (Peters et al., 2008).

### 3.0 LITERATURE REVIEW

The literature review will examine the following themes; academic research focused on special education provision in the context in Trinidad and Tobago and advocacy strategies, outcomes and evaluation.

#### 3.1 SPECIAL EDUCATION IN TRINIDAD AND TOBAGO

The education system in Trinidad and Tobago is based on the British colonial rule of the 1900's, which was inherently elitist; designed to filter and segregate students based on academic performance and examinations (De Lisle, Seecharan, & Ayodike, 2010; Lam, 2011; Libert, 2007;). At eleven years old students complete a common entrance exam, which determines the secondary school they will attend, those with the best exam scores attend the most prestigious and rigorous schools (Lam, 2011). For students with special needs the current exam-focused system perpetuates poor instruction and lower school completion rates (Lam, 2011; Libert, 2007;).

The government of Trinidad and Tobago has a vision of achieving developed nation status by 2020 as well as prosperity for all citizens, which includes poverty eradication and social justice (De Lisle, Seecharan, & Ayodike, 2010). However, the current education system is a barrier to the development of an innovative, productive and creative society as it still produces a low-quality and unskilled workforce (De Lisle, Seecharan, & Ayodike, 2010). Without transforming the education system, the possibility of improvement in education quality is difficult and superficial (Lam, 2011). At present the public schools in Trinidad and Tobago are unable to provide sufficient support for students with special needs and difficulty learning which presents a social justice, equality and human rights issue (Barton & Armstrong, 2007, Paul, 2011).

Students with special education needs are defined as students with greater difficulty learning than the majority of their peers and students who have characteristics that affect their ability to learn (Williams, 2007). Students with special education needs require modifications and adaptations in teaching methods, curriculum, strategies and structures to learn effectively (Williams, 2007). Lack of appropriate educational support services contributes to students with special needs exiting the school system prematurely, which ultimately, impacts their ability to be engaged citizens as adults (Barton & Armstrong, 2007). Special schools exist to deliver education to students with disabilities; however their cost can be excessive. The costs associated with segregated education adversely affect the preparation of students for integration into broader society. Inclusive education has proven to be a more desirable education approach and research indicates that special needs students achieve higher academic success in integrated settings (Armstrong, Armstrong, Lynch, & Severin, 2005; Blackman, Conrad, & Brown, 2012; Paul, 2011). Inclusive education offers a means of transforming the education system to respond to all learners needs, facilitating education for marginalized students (Conrad, Paul, Bruce, Charles, & Felix, 2010; Williams, 2007).

Historically, persons with disabilities and special needs have suffered discrimination and marginalization in Trinidad and Tobago (Conrad, Paul, Bruce, Charles, & Felix, 2010; Paul 2011). Approximately, 90% of Trinbagonians are descendants of Africa or India and as such, present day views towards special needs populations have their roots in long held ancestral beliefs (Libert, 2007). In Africa, disabilities were seen as punishments for evil deeds as well as a mother's infidelity and persons with special needs were shunned and excluded from society (Libert, 2007). In India, were Hindu's believed in reincarnation, a disabled person was seen to be punished for poor karma in a previous life (Libert, 2007). Early cultural beliefs have shaped present day attitudes towards special needs persons in Trinidad and Tobago (Libert, 2007).

### 3.2 EDUCATION AS A SOCIAL JUSTICE ISSUE

Attention must be paid to the interconnecting forms of exclusion and discrimination faced by marginalized populations and holistic solutions developed and implemented (Waitoller & Artiles, 2013). Interconnecting social justice issues for special needs students include, lack of economic and social resources, cultural exclusion, and lack of voice in education decision-making (Waitoller & Artiles, 2013). Education is responsible for preparing students to be active members of society; consequently where exclusion exists, societal attitudes and discrimination towards persons with special needs persist (Conrad, Paul, Bruce, Charles, & Felix, 2010). An inclusive education system presents an opportunity to model democracy, inclusion and social justice to broader society while reducing inequality in education outcomes for marginalized students (Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, Seecharan, & Ayodike, 2010). Waitoller and Artiles (2013) posit that inclusive education can create access and participation in quality education, acknowledgement and appreciation of differences and advance the cause of marginalized groups in society. In addition to early intervention and assessment for disabilities, research further identifies teacher and administrator professional development and training, infrastructure and facility improvements, resource investment and the allocation of support staff services as means of improving support for vulnerable students (Armstrong, Armstrong, Lynch, & Severin, 2005; Peters et al., 2008). Furthermore, policies and legislation at the national level that are developed collaboratively will often assist to ensure that policy design and implementation are relevant in context, culture and meet goals and objectives of initiatives (James, 2010).

In summary, education reform in Trinidad and Tobago is a means of addressing social justice issues and discrimination of persons with disabilities but it requires collaboration and cooperation between government leaders, administrators, educators, parents, students, nonprofit and the private sector (Conrad, Paul, Bruce, Charles, & Felix, 2010). Transformation of the education system requires cross-sector collaboration and leadership that advocates for improved quality, responds to community needs and wants and engages stakeholders in the process of change (Conrad, Paul, Bruce, Charles, & Felix, 2010). Waitoller & Artiles (2013, p. 346) posit that, "the act of dismantling exclusion occurs in a dynamic, politically charged, and historically contingent contexts." Understanding and consideration of the local context, history, attitudes,

power and privilege are central to transforming the education system (Conrad, Paul, Bruce, Charles, & Felix, 2010; Waitoller & Artiles, 2013).

Inclusive education requires holistic changes and collaboration in all parts of the education system from the school facilities to curriculum, from state-policy at the macro-level to school interactions at the micro-level (Waitoller & Artiles, 2013; Williams, 2007). Reform efforts must be based on need, feasibility and require stakeholder consultation, as changes will impact administrations, teachers, students and parents (James, 2010). Change must be a collaborative process that brings together stakeholders and builds capacity of change agents to facilitate and sustain system change (Conrad, Paul, Bruce, Charles, & Felix, 2010; James, 2010).

### 3.3 GOVERNMENT AND SPECIAL EDUCATION

Traditionally, the government of Trinidad and Tobago has not recognized the importance of special education and its various interpretations and applications (Conrad, Paul, Bruce, Charles, & Felix, 2010; Lam, 2011; Libert, 2007; Pedro & Conrad, 2006). Lam (2011) and Libert (2007) posit that weak political will, inadequate resources, ineffective allocation of resources, the burden of debt and indifference to the learning needs of the poor and excluded has impeded the government's commitment to education improvements. Change has been slow due to lack of government support and lengthy bureaucratic processes (James, 2010; Pedro & Conrad, 2006). Another possible contributing factor to the lack of education reform is Trinidad and Tobago's dependency on external funding and funder requirements that are attached to education dollars (Lam, 2011). Questions remain as to the motivation behind the government's rhetoric of education improvement (James, 2010). Is adherence to international funding requirements, enhancing global competitiveness and or commitment to achieving developed nation status sufficient to bring about system wide change? Political resolve is a critical component in the development of an equitable and accessible education system (Peters et al. 2008). While some inclusive practices are possible without supporting policy, reform initiatives are enhanced when local investment and ownership exist. The state plays a critical role in setting the tone for the integration and transformation to an inclusive education system through policy development (Conrad, Paul, Bruce, Charles, & Felix, 2010; Pedro & Conrad, 2006; Waitoller & Artiles, 2013).

The government of Trinidad and Tobago has re-evaluated its educational policy to respond to learner needs, focusing on inclusion and support for students with special needs (Armstrong, Lynch & Severin, 2005). As outlined in the Trinidad and Tobago Education Policy Paper 1993-2003 and again in 2007, the Ministry of Education is at least symbolically committed to transforming the education system to an inclusive education model with the goal of educating all students within an integrated school system (Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, 2009; Peters et al., 2008). However, attempts at establishing inclusive education and adequate support services for children with special education needs have not been effective (Adams-Padia, 2014; Armstrong, Armstrong, Lynch, & Severin, 2005; Paul, 2011). The barriers to inclusive education and support of vulnerable students include, the tradition of an exclusive

and elitist school system, weak policy and implementation strategy, conflicting ideological systems, lack of public support, ineffective leadership at all levels, absence of communication strategy, scarcity of resources, dependency on external funding, lack of cohesion among governmental ministries, policy decisions not translated at the school level, lack of stakeholder involvement in policy creation, inflexible curriculum delivery, lack of teacher training and skill and teacher resistance (Armstrong, Armstrong, Lynch, & Severin, 2005; Blackman, Conrad, & Brown, 2012; Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, 2009). James (2010) goes on to identify challenges such as the Ministry of Education's top-down approach to management, lack of stakeholder consultation and engagement, externally developed policies lacking connection to local culture and school contexts as obstructions to sustainable school improvements.

Inclusive education is a global movement and response to criticisms of exclusion in the education system, specifically, lack of special education programs in regular schools, inadequate teacher training in special education, weak integration of technology in classrooms, poor communication and articulation of inclusive education goals between all levels of schools and throughout education system (Williams, 2007). The Ministry of Education's has undertaken initiatives to transform the education system to a more inclusive style as a means of improving productivity and competitiveness in a skill-based economy and to meet the requirements for developed nation status by 2020 (Williams, 2007). The development of the Seamless Education and inclusive school model is regarded as a pathway to developing an innovative and engaged society (De Lisle, Seecharan, & Ayodike, 2010). Equal access to quality education by all citizens is fundamental to the Seamless Education model as it strives to produce educated graduates prepared to contribute to civil society and economic growth (De Lisle, Seecharan, & Ayodike, 2010). The Ministry of Education's plans for inclusive education have focused on leadership development, teacher training, providing incentives to increase the number of qualified specialists, management and administration training, development of a sensitization communication strategy, enhancement and development of technology in schools, strengthen system for inter-ministry coordination, parent education and empowerment, streamlining curriculum, support for early diagnosis of children with special needs and physical upgrades to public schools, (Peters et al., 2008; Williams, 2007).

### 3.4 POLICY

Education reform requires government policy support and legislation that uphold a commitment to inclusive education and equity (Peters et al., 2008). James (2010) suggests that inclusive education policies must be context specific, encompassing the different levels of the system and be communicated and implemented accordingly. Peters et al., (2008) recommends that stakeholders be involved in identifying needs and priorities, establishing goals, objectives and outcomes and advocating and promoting inclusive education. Insufficient and empty consultation with stakeholders often means that policies are not appropriate to school contexts (James, 2010). Policies must be developed in collaboration, based on trust, attainable

improvements and enhance school level capacity (James, 2010). Peters et al., (2008) and Williams (2007) found that while policies committed to inclusive education exist and several ministries offer programs and activities to support students with special needs, inter-ministerial coordination was lacking. Implementation and enforcement of special education policies were not successful (Peters et al., 2008; Williams, 2007). Policy development must also be based on local evidence and research, with local engagement and ownership and implementation must be monitored and evaluated on an ongoing basis with adjustments made where required (De Lisle, Seecharan, & Ayodike, 2010; Lam, 2011).

The Ministry of Education was encouraged in the report conducted by Miske-Witt and Associates, to continue to review legislation pertaining to discrimination against persons with disabilities (Williams, 2007). Current policies and legislation related to inclusive education must be reviewed and recommendations made for more effective policies (Peters et al., 2008). Examples of pending policy actions which would improve inclusive education reform include approval of inclusive education model by cabinet, enforcement of Trinidad and Tobago's National Policy on Persons with Disabilities and formation of an equal opportunity bill which would guarantee the rights of students to an inclusive education (Williams, 2007).

It has been identified that education professionals in Trinidad and Tobago lack confidence in policy and decision makers' commitment to inclusive education (Conrad, Paul, Bruce, Charles, & Felix, 2010). Administrators are frustrated with the ever-changing improvement strategies implemented by the government, which lack a basis in local research, proper consultation, and adequate resources (James, 2010). Consequently, schools exist in a state of constant change and or lack of change, which conflicts with a process of sustainable improvement (James, 2010). An innovate vision for education is not sufficient; initiatives must, align with stakeholder needs, build system-wide capacity and develop linkages across relevant ministries (James, 2010). Policy development must be accompanied by a communication strategy between the ministry and schools with regards to policy implementation to improve the success of inclusive education initiatives and ensure that proper resources and training are available (James, 2010; Lam, 2011). Perhaps the most logical recommendation is presented by James (2010), which states that the Ministry of Education should implement fewer policies providing schools an opportunity to fully integrate policies, values and strategies enhancing the sustainability of change efforts.

Change must build on school commitment with support from the Ministry of Education and whereas the government wants schools to take more responsibility and leadership, the required authority is not available at the school level (James, 2010). Decentralized and participatory leadership is being advocated for and recommended throughout the system; however, the leadership of players at all levels remains authoritarian (De Lisle, 2009). Policy documents with commitments to student-centred, collaborative, and bottom up approaches exist however, no implementation model has functioned and top-down, centralized management continues (James, 2010). For example, despite ministry commitment to decentralization, principals do not have the authority to hire or fire staff (James, 2010).

### 3.5 LACK OF RESEARCH

At present, education reform in Trinidad and Tobago lacks local research, data and analysis (Paul, 2011). Limited context specific research and knowledge exists and where it does exist sampling is small and inconsistently utilized in education reform initiatives (Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, Seecharan, & Ayodike, 2010; Lam, 2011). For example, no data exists on the effects of Trinidad and Tobago's education policies and practices on the special needs students (Paul, 2011). Furthermore, there is no established method or system for monitoring the academic progress of special needs students (Paul, 2011). Similarly, while international data on Trinidad and Tobago's education achievement exist, it is rarely utilized in policy and practice development (De Lisle, Seecharan, & Ayodike, 2010).

International best practices, trends, policies, strategies and ideologies are considered superior to those of Trinidad and Tobago and developed to adhere to world-class education standards (Lam, 2011). However, implementation of special education policies and practices from abroad has been unsuccessful as resistance and a disconnect exists between best practices in theory and the local context, knowledge, experience, resources and infrastructure (James, 2010; Lam, 2011; Paul, 2011). For example, inclusive education has global support but can it be sustainably implemented in the context of Trinidad and Tobago? One potential solution posed by Lam (2011) is for increased collaboration and sharing within the Caribbean region where contextual similarities exist and education modernization is needed. Consequently, the Paul (2011) posits that local research and data are critical to sustainable and effective education reform.

### 3.6 LEADERSHIP, TRAINING AND PROFESSIONAL DEVELOPMENT

Inclusive education and support for special needs students can only be achieved and sustained if leadership, training and attitude transformation initiatives are introduced and are effective (Conrad, Paul, Bruce, Charles, & Felix, 2010; De Lisle, 2009). Traditionally, institutional management in Trinidad and Tobago has focused on stability, and control (De Lisle, 2008). From the Ministry of Education to school administration, leadership styles have been authoritarian in nature and although there is some movement towards more participatory leadership, innovation remains absent (De Lisle, 2009; James, 2010). De Lisle (2009) posits that innovation is required to make fundamental changes in challenging environments, where poverty, marginalization and institutionalized ideologies exist. Post-colonial leadership practices conflict with more modernized leadership practices and act as a barrier to education reform (De Lisle, 2009). Furthermore, James (2010) posits that reforms efforts fail when externally imposed. Transformation requires a level of control, autonomy and leadership at the school level.

The values and beliefs held by education leaders can make or break improvement and reform efforts (De Lisle, 2009). The shift to inclusive education requires "progressive educators committed to social action, responsive research, and the pedagogy that promotes democracy and education for marginalized students" (Conrad, Paul, Bruce, Charles, & Felix, 2010, p. 60). Leadership development is required at the school level that can change behaviours, attitudes and beliefs while developing a commitment to shared leadership, collaboration between

administration and teaching staff and responsiveness (De Lisle, 2009; James, 2010; Williams, 2007).

Leadership training in Trinidad and Tobago must provide an opportunity for leaders to explore both traditional practices and new concepts and ideologies, grounded in theory developed within the Caribbean context (De Lisle, 2009). Up to this point, leadership training has been ineffective because it has lacked relevance in the local context and therefore failed to shift values and ideals held by leaders at all levels of the education system (De Lisle, 2009). Furthermore, leadership training adopted from international best practices has not taken into account the local context and knowledge (De Lisle, 2009). At the same time pervasive ideologies and "institutional bureaucracy reinforces past leadership tendencies and practices (De Lisle, 2008, p. 79).

Principal leadership and support for inclusive education, from vision to implementation, is essential for transformation of the education system (Pedro & Conrad, 2012; Peters et al., 2008). While most principals support inclusive education in theory, many worry about the capacity of their schools to support special needs students (Peters et al., 2008). Barriers to inclusive education include, inaccessibility of facilities, lack of teacher training, lack of support from special education staff and lack of resources (Peters et al., 2008).

Inclusive education requires specific teacher training that produces a shift in teacher attitudes, beliefs and practice with regards to inclusion, curriculum, instruction and assessment (Peters et al., 2008). Waitoller and Artiles (2013) posit that the implementation of an inclusive education policy is enhanced as teacher's and administrator's attitudes and beliefs towards integration are transformed. Teachers must have the capacity, skills, confidence and understanding of the local context to provide quality education to students with diverse needs (Conrad, Paul, Bruce, Charles, & Felix, 2010; Waitoller & Artiles, 2013).

At present, there are insufficient training programs in inclusive education and special education for in service teachers and student teachers (Peters et al., 2008). Whereas, most teachers support inclusive education and agree that all children have the ability to learn and deserve a quality education, effective teaching techniques, training and resources are lacking. Lack of teacher training impacts the support available to special needs students (Peters et al., 2008). Waitoller and Artiles (2013) posit that teacher quality is the single most important factor affecting student success. In terms of teacher training, 90% of teacher respondents indicated that they lacked qualifications in special needs education. Of surveyed teachers, 45% somewhat understood what was required to teach in an inclusive classroom setting (Peters et al., 2008; Williams, 2007).

Curriculum and instruction must also be modernized, flexible and meet the needs of all students (James, 2010). Waitoller and Artiles (2013) posit that curriculum and instruction must acknowledge different learning styles and student diversity. In terms of experience with differentiated curriculum, 7% of teacher respondents said they had a lot of experience and 40% had some knowledge but, very little experience (Williams, 2007). At the time of the Miske Witt

and Associates survey the only strategy/support provided to students with learning disabilities was more time to complete schoolwork, with few teachers investigating accommodations or adaptations for students with special needs (Williams, 2007). Some one-on-one assistance was provided during student and teacher breaks and it was observed that teachers did try to use positive reinforcement to motivate and support students (Williams, 2007).

The need for and importance of professional development that prepares school personnel for an inclusive education model and curriculum differentiation is appreciated and understood by Ministry of Education officials, administrators and teachers (Peters et al., 2008; Williams, 2007). Conrad, Paul, Bruce, Charles, and Felix (2010) recommend short duration courses that re-train teachers in the philosophy behind inclusive education, developing behaviour management skills, and providing an opportunity to alter negative attitudes towards special needs students. Similarly, Peters et al., (2008) recommend teacher training in universal design instruction which utilizes a diversity of approaches, making curriculum more accessible for all students. The University of Trinidad and Tobago has developed a four-year Bachelors of Education with some focus on special education, specifically to provide teachers in training the skills to meet the needs of all learners through differentiated curriculum (Williams, 2007). To modernize curriculum and adapt testing materials, the Ministry of Education has also implemented an assessment program at the primary school level and provided remedial programs in literacy to address students with difficulty learning (Williams, 2007). Finally, policies, monitoring and evaluation mechanism need to be established to assess teacher instruction and curriculum effectiveness (Paul, 2011).

### 3.7 SOCIALIZATION AND OUTREACH

Socialization and outreach can assist in addressing discrimination towards students with special needs by building awareness and acceptance of inclusion by the general public (Peters et al., 2008). There is a lack of societal awareness and sensitivity towards persons with disabilities and special needs in Trinidad and Tobago, which combined with competitive, elitist, colonial education traditions makes rethinking and restructuring the school system challenging (Conrad, Paul, Bruce, Charles, & Felix, 2010; Peters et al., 2008; Paul, 2011; De Lisle, Seecharan, & Ayodike, 2010). De Lisle, Seecharan, & Ayodike (2010) and Lam (2011) posit that local elites have benefited from the colonial education system. Consequently, the shift towards integration, equity and equality in education means addressing long held attitudes and beliefs that failed to provide equal opportunities. Socialization and outreach are required to raise public, agency and educator awareness with regards to special education, the goal and benefits of an inclusive education and transform cultural views so that differences are accepted and represented in schools, instruction methods, assessment tools and curriculum content (Peters et al., 2008; Waitoller & Artiles, 2013).

While many stakeholders, including parents and students, appreciated the idea of inclusive education as a means of socialization, and exploring and experiencing differences, concerns about education reform persist. An effective communication strategy, which highlights the goals, philosophy and benefits of inclusive education, would assist in addressing the fears of students

and parents that the inclusion of special needs students will affect the quality of education (Peters et al., 2008). Similarly, a communication strategy that builds public awareness and sensitization for special education issues helps to address concerns held by parents and students with special needs that their needs will not be adequately met in an integrated classroom (Peters et al., 2008). Accordingly, socialization and outreach must be supported by an inclusive education policy at the national level (Peters et al., 2008; Williams, 2007).

Findings indicate that pockets of excellence exist with regards to a communication strategy for sensitization. However in most cases, sensitization advocacy strategies were poorly coordinated, informal and inconsistent, with resources like the volunteer/nonprofit sector being underutilized (Williams, 2007). In terms of developing a multi-pronged strategy for sensitization to special needs issues, it was recommended that examples of excellence be scaled up, higher education institutions be utilized to provide parent and teacher training, individuals with disabilities and their organizations be involved in the planning and implementation of the sensitization strategy (Williams, 2007).

### 3.8 OCCURRENCE AND ASSESSMENT OF SPECIAL NEEDS STUDENTS

Discrepancy exists between the diagnosed occurrence and the actual occurrence of special needs students within the school system in Trinidad and Tobago. Survey data identified that 4% of regular primary school students and 2% of regular secondary school students have diagnosed disabilities (Peters et al., 2008). Surveyed teachers suspected that up to 20% of students in regular schools presented with disabilities or difficulty learning (Peters et al., 2008). Data provided by Williams (2007) presented slightly different information on the occurrence of disabilities and diagnosis in Trinidad and Tobago, with 26% of classrooms with at least one visually impaired student, 37% of classrooms with at least one student with a diagnosed learning disability and 35% of classrooms with a student with a cognitive impairment. However survey results revealed that 69% of teachers believed that their classroom had at least one student with an undiagnosed learning disability and 62% of teachers felt that they had at least one student with undiagnosed cognitive impairment (Williams, 2007).

Diagnosis of disabilities and learning difficulties is lacking in Trinidad and Tobago and while physical and or sensory disabilities are more easily diagnosed, learning, behavioural and cognitive disabilities are less obvious and less diagnosed (Peters et al., 2008). Lack of diagnosis and appropriate interventions puts students at risk of school failure (Peters et al., 2008). There is currently no formal assessment for diagnosing disabilities and or individualized education plans for students with difficulty learning (Paul, 2011). Similarly, academic intervention for students with poor performance is weak (De Lisle, Seecharan, & Ayodike, 2010). For example, 36% of students under nine years old were found to be below international benchmarks for reading, leaving little opportunity for academic intervention and improvement before the secondary school entrance exam which determines the quality of future education available to students (De Lisle, Seecharan, & Ayodike, 2010).

To enhance assessment and early intervention Peters et al., (2008) explained that diagnostic tools must exist to assess the academic achievement of special needs students and develop an understanding of how teachers, parents and other service providers can support special needs students (Peters et al., 2008). Furthermore, standardized testing and assessment can provide data to evaluate the current system and indicate areas for improvement (James, 2010). The creation of the SSSD by the Ministry of Education in 2005 was a step towards improving early diagnosis efforts of special needs students (Williams, 2007). To further support early diagnosis of children with special needs it was recommended that the SSSD expand support services, provide resources for visually and hearing impaired students and expand the use of technology to support learners (Williams, 2007). Formal analysis and diagnosis of student behaviour and learning needs is required to support students with effective strategies and adaptable instruction (Peters et al., 2008).

At present, special needs students must meet specific criteria to be integrated into regular schools (Conrad, Paul, Bruce, Charles, & Felix, 2010). The criteria includes, parent support, basic sign language and/or oral speech and students must be less than eight years old (Conrad, Paul, Bruce, Charles, & Felix, 2010). As a move towards inclusive education 21 visually impaired students and 26 hearing impaired students have been placed in regular schools with some support from special education teachers, aides and interpreters (Williams, 2007). At present, regular schools are still hesitant to accept and welcome students with behaviour issues (Conrad, Paul, Bruce, Charles, & Felix, 2010). However, many special needs students have behaviour issues as a consequence of poor parenting, abuse and neglect, family crisis, poor academic and social skills and lack of social relationships (Conrad, Paul, Bruce, Charles, & Felix, 2010). Conversely, many students that are transferred from regular school to special schools are moved because of poor academic performance not because of confirmed diagnosis (Paul, 2011).

### 3.9 SPECIAL EDUCATION TEACHERS AND SUPPORT STAFF

Special education teachers and support staff are essential for inclusive education as they can inspire and model inclusion for regular teachers who resist inclusive schools (Conrad, Paul, Bruce, Charles, & Felix, 2010). Peters et al., (2008) posit that the inclusion of special education support teachers assist all teachers to develop strategies and instruction methods that support all students. The system requires more support staff such as special education teachers, guidance counselors, social workers and diagnostic professionals. Of the 480 primary schools and 140 secondary schools, only 40% had special education teachers, guidance counselors, and social workers, not to mention a limited number of speech and occupation therapists and child psychiatrists (Williams, 2007). 88 of the 480 primary schools have special education support teams and systems providing support for special needs students and 60 of the 140 secondary schools have a full time guidance counselor (Williams, 2007).

The government of Trinidad and Tobago has approved increases in staffing for guidance counselors, social workers and special education teachers as well as the development of the cluster school models whereby special education personnel can be shared among several schools

(Peters et al., 2008; Williams, 2007). Since 2005, 65 guidance counselors, 30 special education teachers, 30 social workers and 2 psychologists have been employed in Trinidad and Tobago schools (Williams, 2007). Furthermore, post secondary scholarships in specializations such as speech therapy have been created and the opportunity to outsource specialized services for special needs students is being considered (Williams, 2007). The opportunity to outsource specialized services for special needs students is a viable option as well as continuing to provide training, incentives and contracts for special education and support staff (Williams, 2007).

The Miske-Witt and Associates report set system transformation goals for 2010-2015 which included the training of personnel in inclusive education by 2010, increase access to support professionals in schools and the provision of teacher training in basic special education by 2015 (Peters et al., 2008). Furthermore, inclusive education model schools would be established in all eight school districts by 2010 (Peters et al., 2008). Model schools would be guided by the development of a shared vision by key education stakeholders with decision making authority who would establish an action plan for implementing inclusive education based on a concrete understanding of the current school system (Peters et al., 2008).

Model schools would incorporate Teacher Assistant Teams, which include lead teachers, special education teachers, guidance counselor and/or social workers and diagnostic professionals (Peters et al., 2008). Teacher Assistant Teams would mentor teachers, develop classroom interventions such as instructional strategies for special needs students, manage student referral and individualized education plans, advocate for a safe and integrated school environments and strengthen school/community relationships (Peters et al., 2008).

The policies required to support the establishment of inclusive education model schools include, changes to salary structures to provide incentives for increased responsibility, changes in the hiring procedure to speed up process, establishing time for collaborative planning, limiting classroom size and developing standard qualifications for new positions (Peters et al., 2008). Similarly, policies are required that advance the acceptance of inclusive education as the education model of choice, enforce national policy on persons with disabilities, and guarantee the right of all children to inclusive education (Peters et al., 2008).

The Ministry of Education expects that collaboration between regular and special schools will bring about inclusive education (Conrad, Paul, Bruce, Charles, & Felix, 2010). In reality, leadership and champions at all levels of the system and organization are required to establish a vision, effective implementation strategy and sustain improvements (James, 2010). The Cascade School for the Deaf and the Wharton Patrick School in Trinidad are examples of special schools that have taken a leadership role in developing inclusive schools (Conrad, Paul, Bruce, Charles, & Felix, 2010). Both schools have acted as resources assisting regular schools with integration and support for special needs students (Conrad, Paul, Bruce, Charles, & Felix, 2010). However, Lam (2011) posits that skill sharing is a challenge in the Caribbean as teachers tend to view one another competitively and a culture of cooperation does not exist. However, Conrad, Paul,

Bruce, Charles, and Felix (2010) posit that special schools are committed to supporting the transition to inclusive schools, realizing that inclusion is a means of addressing social justice issues for marginalized students. Sharing information, skills and strategies, training regular school staff in special needs education, acting as advocates for inclusive education and developing cooperation between parents and schools are strategies utilized by special schools to promote inclusion (Conrad, Paul, Bruce, Charles, & Felix, 2010).

Special schools could also act as training or resource centres for teachers and administrators in regular schools or be developed as support units within inclusive schools (Conrad, Paul, Bruce, Charles, & Felix, 2010). Additionally, special schools may continue to exist to educate students with disabilities who cannot be suitably accommodated in regular schools or provide short term support for students struggling in regular schools (Conrad, Paul, Bruce, Charles, & Felix, 2010). However, without proper resources and implementation strategies, initiatives for inclusive education will fail (Conrad, Paul, Bruce, Charles, & Felix, 2010).

### 3.10 ADMINISTRATIVE BARRIERS TO INCLUSIVE EDUCATION

At the administrative level, it was found that the centralized Ministry of Education system had weak management structures at the district and school levels (Williams, 2007). To address education management and administration issues within the school system, the Ministry of Education created a decentralized unit to manage and implement the reorganization process and training at the school and district level has been initiated (Williams, 2007). James (2010) recommends improvement initiatives including, establishment of local school boards, restructuring of the Ministry of Education services and arrangements at all levels, strengthening ministry institutions and human resource capacity, inter-ministerial collaboration, and establishing coordination efforts for school improvement. Further, the centralized, top down management style of the Ministry of Education, preserves autocratic leadership at the school level, which impedes school level collaboration required to system reform (James, 2010). A decentralized management model will improve the capacity to monitor, evaluate, and support implementation of school reform and policies (James, 2010).

Sufficient resources to ensure implementation success and sustainability must accompany education reform as well as a shift to school level management of resource (James, 2010). Appropriate resources allocation and school level resource management enhances the capacity and commitment to change (James, 2010). Similarly, pilot projects that test educational reforms require adequate resources (Pedro & Conrad, 2006). The majority of schools in Trinidad and Tobago had limited teaching resources, inadequate specialized resources and essentially no computer or Internet access (Williams, 2007). For example, some schools have computer technology available but lack trained staff to deliver technology-based education (James, 2010). The current initiatives with regards to technology enhancement in schools indicated that 10% of primary schools and 40% of secondary schools had access to computers (Williams, 2007). It was recommended that students and teachers have increased access to specialized resources and continued investment and training in computers and technology is required (Williams, 2007).

Further resources are required for physical upgrades to schools, which are presently inaccessible for children with mobility issues (James, 2010; Peters et al., 2008; Williams, 2007). In terms of physical accessibility to schools, all new schools will be built adhering to international standards for accessibility (Williams, 2007).

### 3.11 ADVOCACY

Advocacy is defined as activities that challenge social justice issues in an attempt to bring about social change (Donaldson, 2008; Mellinger, 2014). Almog-Bar and Schmid, (2013) further describe advocacy as a means of providing a voice to marginalized persons, empowering such individuals and improving the quality of life for a specific population. Advocacy activities include lobbying, educating, skill building, mobilizing and organizing populations, researching and analyzing social justice issues, letter writing, protesting, boycotting, petitioning, building relationships, convening and facilitating (Donaldson, 2008; Mosley, 2009). A review of advocacy research suggests there is agreement on the basic building blocks required for the development of more formal advocacy participation which include dedicated staff and resources, stakeholder involvement, organizational leadership, diversified funding, organizational lifecycle, and participation in coalitions (Almog-Bar & Schmid, 2013; Mellinger, 2014; Mosley, 2009). Many human service organizations actively engage in advocacy to support issues and interests of their constituents and to further their organizational mission (Mulholland, 2010). However, contrary to organizations focused specifically on advocacy, most human service nonprofits undertake advocacy in addition to their core activities. Unfortunately advocacy is often done in an inconsistent, unstructured and under-resourced way (Donaldson, 2008; Mellinger, 2014, Mosley, 2009). Mellinger (2014), Mulholland (2010) and Mosley (2009) posit that the lack of planned and structured participation in advocacy impacts on its ultimate effectiveness in bringing about social and policy change.

### 3.12 ADVOCACY STRATEGIES

Research identifies several potential advocacy strategies, ranging from cooperative to antagonistic. Fox, Helweg, and Hansen (1997) offer a broad overview of potential strategies, starting with collaborative strategies, where agreement exists between political institutions and civil society as to the reform required and parties work collaboratively to bring about the desired change. Modeling advocacy strategies or pilot programs are utilized to demonstrate successful alternatives or solutions to complex issues (Fox, Helweg, & Hansen, 1997). Organizations often undertake educational advocacy strategies whereby they provide research, analysis and data to government entities in hopes of influencing priorities, policies and decision-making (Fox, Helweg, & Hansen, 1997). The above examples would be defined as administrative advocacy which is seen as a less confrontational means of producing policy changes and takes the form of cooperative relationships with government entities and policy makers (Almog-Bar & Schmid, 2013). Administrative advocacy includes meetings with government officials, participating on advisory and planning committees, providing information to government agencies and networking with government personnel (Almog-Bar & Schmid, 2013).

Nonprofit human service organizations are more likely to undertake cooperative advocacy activities, building relationships and trust with government bodies to influence policy and decision-making (Almog-Bar & Schmid, 2013; Garrow & Hasenfeld, 2014). The nonprofit human service sector has a complex relationship with political institutions as organizations provide services, which are largely government funded (Garrow & Hasenfeld, 2014). The trend of governments funding nonprofits to provide services once provided by the state has led to an increase use of insider and cooperative forms of advocacy (Almog-Bar & Schmid, 2013; Garrow & Hasenfeld, 2014). Cooperative forms of advocacy have been found to be effective in bringing about policy level change (Almog-Bar & Schmid, 2013; Garrow & Hasenfeld, 2014). Nonprofit organizations also have a greater opportunity, due to the mutual dependency that exists between nonprofits and the government, to impact policy decision (Almog-Bar & Schmid, 2013). However, Almog-Bar and Schmid (2013) caution that organizations must remain cognizant of the interests of their constituents and represent the needs and wants of the marginalized populations they serve when utilizing insider advocacy tactics.

Nonprofit organizations often focus their advocacy efforts on providing social benefits to citizens and/or securing organization benefits such as increased and sustainable government funding (Garrow & Hasenfeld, 2014). Advocacy for social benefits is focused on improving social rights and encouraging the government to meet the needs of its citizens (Garrow & Hasenfeld, 2014). On the other hand, advocacy for organizations benefits concentrates on improving the sustainability of the organization and improving circumstances for the specific constituents rather than addressing broad social justice goals (Garrow & Hasenfeld, 2014). Garrow and Hasenfeld (2014) posit that organizations want to maintain their relationships with stakeholders and the state and therefore often forgo adversarial advocacy that attempts to transform macro-level social issues.

Outsider advocacy tactics are a more indirect form of advocacy, which include public education, use of mass media, protests and boycotts to bring about system reform (Almog-Bar & Schmid, 2013). More aggressive advocacy strategies include persuasion advocacy, the mobilization of mass support for an issue through education, awareness building and the development of coalitions, which can force the hand of political institutions to adopt the desired reform recommendations (Fox, Helweg, & Hansen, 1997). Legislative advocacy as defined by Almog-Bar & Schmid (2013) include strategies such as lobby for policy reform, testifying at hearings, producing research reports, letter writing and or calling campaigns. Legislative advocacy is seen as a more antagonistic and confrontation form of advocacy (Almog-Bar & Schmid, 2013). The most confrontation advocacy strategies as presented by Fox, Helweg, and Hansen (1997) include advocacy through litigation and contestation such as boycotts and protests. There is an increased trend in online advocacy, also known as e-advocacy, which includes online petitions and blogs (Almog-Bar & Schmid, 2013). Online advocacy has the ability to engage large numbers of stakeholders across geographic boundaries to influence decision-making at a global level.

Effective advocacy campaigns include a combination of activities that produce changes at the legislative level while empowering constituents and building public awareness of salient social issues. These advocacy activities can include setting up meetings between government officials, stakeholders and constituents, providing policy recommendations to government entities, empowering and supporting constituents as self-advocates, generating media attention on social justice issues and building or lending support to coalitions, and enhancing public awareness of issues facing marginalized populations (Almog-Bar & Schmid, 2013)

### 3.13 ADVOCATING FOR POLICY CHANGE

Advocating for policy change is one of the most effective means of producing changes when faced with complex, system-wide issues, like education reform (Barkhorn, Huttner, & Blau, 2013). Policy advocacy attempts to change policies and influence government decisions with regards to resource allocation for marginalized populations (Almog-Bar & Schmid, 2013). Policy advocacy is a means of bolstering social justice issues, empowering marginalized members of society thereby strengthening civil society and promoting broader participation in democracy (Almog-Bar & Schmid, 2013). Some nonprofit human service organizations participate in policy advocacy in addition to their service delivery functions (Almog-Bar & Schmid, 2013). Organizations involved in policy advocacy represent their constituents and broker a relationship between marginalized citizens and the state (Almog-Bar & Schmid, 2013).

An additional emerging trend, as described by Mulholland (2010), is the development of "un-organizations", similar to coalitions; organizations collaborate across sectors towards a shared vision and goal. Coalitions and un-organizations can be seen as communities of purpose, with shared leadership, common interests, focused on communication, engagement and action (Mulholland, 2010). Un-organizations can be effective in policy advocacy, as they may not be directly constrained by government funding but, have an inspirational goal, innovative means of attaining their goal and take advantage of a window of opportunity to influence and inspire government policy and decision making (Mulholland, 2010).

Policy advocacy has traditionally been undertaken by larger organizations and or coalitions of several organizations with similar goals and vision for change (Mulholland, 2010). Mulholland (2010) suggests that an organization ask the following questions to determine if policy advocacy is the appropriate strategy based on the local context, organizational skill and desired outcome:

- Is policy advocacy part of the organization's mission?
- What resources, skills and capacity are required to effectively undertake policy advocacy?
- Does the necessary expertise and leadership exist within the organization?
- Is the organization duplicating or competing with other organizations in its policy advocacy strategy?
- Is the organization interested in being a leader in policy development?

If an organization answers no to any of the above questions it might want to re-evaluate if policy advocacy is the appropriate strategy for the organization (Mulholland, 2010). Perhaps a more effective strategy would be for the organization to support another organization or coalition undertaking policy advocacy (Mulholland, 2010).

### 3.14 ADVOCACY THROUGH AWARENESS AND EDUCATION

Awareness building, sensitization and public education, although less recognized as forms of advocacy, are effective advocacy strategies and often a prerequisite for policy change. Pedro and Conrad (2006) posit that sustainable state policy for education reform is more likely to manifest as a result of socio-political pressure and community-based advocacy (Pedro & Conrad, 2006). As such, the ability to shift paradigms and strongly held societal beliefs is considered by Meadows (1997) to be the most effective leverage point for bringing about system change. Advocacy through public awareness and sensitization to social justice issues can transform societal attitudes and beliefs that act as a barrier to change (De Lisle, Seecharan, & Ayodike, 2010). Bringing attention to the failures of old paradigms and presenting and modeling viable alternatives to widely held societal beliefs or system functions can change societal norms and beliefs (Meadows, 1997). Organizations can act as change agents, advocating for system improvements and educating and transforming mindsets of the general population (Meadows, 1997)

### 3.15 ADVOCACY OUTCOMES

On a continuum, advocacy outcomes can be transformational, developmental or instrumental (Fox, Helweg, & Hansen, 1997). Transformational outcomes involve constituent empowerment whereby, marginalized populations develop the capacity to identify and address issues that impact them (Fox, Helweg, & Hansen, 1997). Developmental advocacy involves strategies that strengthen civil society and encourage democracy (Fox, Helweg, & Hansen, 1997). Instrumental advocacy as defined by Fox, Helweg, and Hansen (1997), influences policy producing macro-level transformations. Fox, Helweg, and Hansen (1997) posit that in most cases, citizen empowerment and strong civil society are prerequisites for instrumental advocacy or policy level changes. Conversely, instrumental advocacy strategies that influence policy level changes enhance citizen empowerment and civil society.

Transformational, developmental and instrumental advocacy are mutually reinforcing (Fox, Helweg, & Hansen, 1997). In most cases, transformational outcomes and development outcomes are preconditions for achieving policy level outcomes or instrumental advocacy outcomes (Fox, Helweg, & Hansen, 1997). Transformational advocacy is focused on the who and what of the issue. Transformational advocacy aligns with Almog-Bar and Schmid's (2013) first level of advocacy, which seeks to provide a forum where marginalized voices can be heard by stakeholders, policy makers, government officials and the general public. Developmental advocacy is related to how an issue is communicated and is related to agenda setting whereby, organizations gain support for policy change by those with decision-making power and authority (Almog-Bar & Schmid, 2013; Fox, Helweg, & Hansen, 1997). Fox, Helweg, and Hansen (1997)

define instrumental advocacy as the way in which desired outcomes are achieved which is related to Almog-Bar and Schmid (2013) concept of an advocacy outcome, a change in legislation or regulations based on advocacy activities (Almog-Bar & Schmid, 2013). Instrumental advocacy is further related to Almog-Bar and Schmid (2013) upper outcome levels, when a desired policy reaches the implementation stage, is implemented and produces the desired effect and results (Almog-Bar & Schmid, 2013). Finally, the highest level of advocacy outcome is when a new policy becomes commonly recognized as a societal norm (Almog-Bar & Schmid, 2013).

Transformational advocacy focuses on empowering individuals to have the capacity, knowledge and skill to actively participate in civil society (Fox, Helweg, & Hansen, 1997). As such, transformation advocacy is a building block for bolstering and sustaining an egalitarian society (Fox, Helweg, & Hansen, 1997). Building the capacity of citizens and their understanding of human rights and social justice issues is fundamental to a transformational approach; however, these changes require education, long-term commitment and are difficult to measure and assess in terms of improvement (Fox, Helweg, & Hansen, 1997). Citizen empowerment transforms an indifferent population into one that is aware and passionate about addressing salient issues (Fox, Helweg, & Hansen, 1997).

Developmental advocacy outcomes seek to build social capital and transform power imbalances, which exist between the state, citizens and marginalized members of society (Fox, Helweg, & Hansen, 1997). Fox, Helweg, and Hansen (1997) define developmental advocacy as:

the ability of citizens to organize themselves collectively to alter existing relations of power by providing themselves with lasting institutional capacity to identify, articulate and act on their concerns, interest and aspirations, including the ability to achieve specific and well defined policy outcomes (p.11).

In society, human service and or community-based organizations represent constituents in political arenas so that their interests, needs and wants can influence decision-making and government priorities (Fox, Helweg, & Hansen, 1997). Fox, Helweg, and Hansen (1997) posit that community service organizations strengthen civil society through developmental advocacy by building constituent capacity, researching social justice issues, creating and adhering to sector codes of conduct and standards, as well as diversifying funding so as to rely less on government funding for the provision of client services (Fox, Helweg, & Hansen, 1997).

Instrumental advocacy has the capacity to sway major policy outcomes that affect citizens (Fox, Helweg, & Hansen, 1997). This is most often accomplished when citizens participate through community service organizations and coalitions, giving voice to marginalized members of society and collaboratively working towards a common goal (Fox, Helweg, & Hansen, 1997). Effecting political policy occurs when civil society has the will, capacity and access to influence

public policy and decision-making, communicate required policy reforms, shape and monitor policy implementation and evaluate and make changes of policies as required (Fox, Helweg, & Hansen, 1997).

### 3.16 CHOOSING AN ADVOCACY STRATEGY

Organizations must decide which advocacy strategy to utilize by evaluating the local context, resources required, organizational comfort-level and advocacy expertise and experience (Barkhorn, Huttner, & Blau, 2013). Strategies must be evaluated based on their inherent strengths and weaknesses (Barkhorn, Huttner, & Blau, 2013). Furthermore, organizations must remember that any number of advocacy strategies have the potential to produce impact and bring about change (Barkhorn, Huttner, & Blau, 2013). Barkhorn, Huttner, and Blau (2013) caution that throughout an advocacy lifecycle contexts change, new parties come into power, priorities shift and as such, effective advocacy strategies/campaigns must be capable of adapting quickly to new conditions. Organizations must also identify the level of change that is possible given the local political context (Fox, Helweg, & Hansen, 1997). For example, an organization must decide whether policy level reform is required and attainable or should advocacy efforts focus on access and the delivery of social services and/or public education and awareness of social justice issues (Fox, Helweg, & Hansen, 1997). Organizational risk is inherent in an advocacy campaign, as organizations utilize valuable resources to undertake advocate activities for disenfranchised and excluded populations without assurance that initiatives will be successful. As such, organizations must analyze and evaluate possible risks before commencing an advocacy campaign (Fox, Helweg, & Hansen, 1997).

An organization often selects its advocacy strategy based on how and where it perceives the origin of issue to be (Garrow & Hasenfeld, 2014). If an organization views an issue as a personal deficit, it might advocate for the individual to receive services that improve that specific individual's capacity (Garrow & Hasenfeld, 2014). If a social justice issue is believed to exist due to lack of available services or barrier to services an organization might advocate for improved access and or delivery of services (Garrow & Hasenfeld, 2014). Additionally, an organization might advocate for structural, macro-level changes when it perceives that an issue is caused by societal or system-wide inequality (Garrow & Hasenfeld, 2014). Garrow and Hasenfeld (2014) posit that an organization is more likely to advocate for social benefits when it recognizes and appreciates the environmental or structural causes of social issues that constituents face (Garrow & Hasenfeld, 2014).

When choosing an advocacy strategy an organization must first undertake an analysis of the local context, identifying limitations and constraints to policy effectiveness as well as, social justice issues lacking policy representation or outdated policies (Fox, Helweg, & Hansen, 1997). Fox, Helweg, and Hansen (1997) outline key contextual factors specific to transformational, developmental and instrumental forms of advocacy. Transformational advocacy defined, as a process, which empowers citizens, requires a democratic culture, awareness of basic human rights, participatory decision-making and a collaborative approach to solving challenging social

issues (Fox, Helweg, & Hansen, 1997). Developmental advocacy, which enhances the capacity of civil society, requires the participation of citizens acting on behalf of marginalized members of society to influence political will (Fox, Helweg, & Hansen, 1997). Instrumental advocacy, the capacity to shape policy, requires broad citizen support for a specific issue as well as, community service organizations that represent the shared vision of constituents. Further, instrumental advocacy requires that organization have a commitment to collaborative decision-making processes, a strategic objective and credibility and legitimacy to influence political decision-making (Fox, Helweg, & Hansen, 1997). Community based service organizations intent on instrumental advocacy must also have a comprehensive understanding of the chosen advocacy strategy and from there, develop a campaign to address a salient issue requiring reform (Fox, Helweg, & Hansen, 1997). An effective instrumental advocacy strategy requires the mapping of power relations, stakeholder interests and identifying potential coalition members, allies and opponents (Fox, Helweg, & Hansen, 1997). Research and policy analysis, as well as the development of sound, research-supported policy recommendations, are additional components of an instrumental advocacy strategy (Fox, Helweg, & Hansen, 1997). Additionally an advocacy campaign requires the assessment and mobilization of resources required for the chosen strategy (Fox, Helweg, & Hansen, 1997). Fox, Helweg, and Hansen (1997) further posit that the creation of coalitions that act together to create policy recommendations, monitor and evaluate policy implementation and engage media to push the reform objectives enhances instrumental advocacy effectiveness. When organizations collaborate as a sector in the form of coalition or advocate through cross-sector collaboration, their voice and interests are more likely to be heard by policy makers (Almog-Bar & Schmid, 2013).

Barkhorn, Huttner and Blau (2013) identify critical success factors for effective advocacy campaigns, which include:

1. The existence of applicable and functioning legislative, legal and regulatory bodies;
2. A salient issue to be addressed and a demand for solutions;
3. Realistic solutions that produce the intended benefits;
4. An appropriate advocacy strategy and communication plan;
5. Campaign leadership to mobilize resources and support
6. Advocacy allies or a coalition to bolster movement and strategy;
7. Public support for solutions and social change;
8. Champions and decision-makers who can address opposition to change and support proposed solutions; and
9. A committed implementing organization with the resources, ability and drive to implement the advocacy strategy

While not all factors will be present in every situation, an organization's can assess to what extend the various conditions exist and determine the most effective advocacy strategy (Barkhorn, Huttner, & Blau, 2013). Similarly, conditions can change through the duration of advocacy activities and organizations must remain flexible and adjust strategies to suit complex

environmental changes (Barkhorn, Huttner, & Blau, 2013). Any advocacy strategy will be more successful when it attempts to overcome and develop absent conditions (Barkhorn, Huttner, & Blau, 2013).

### 3.17 ORGANIZATIONAL PROPERTIES THAT IMPACT ADVOCACY ACTIVITIES

Several organizational properties can either enhance or limit an organization's ability to advocate effectively. The age and stage in the organization's lifecycle can impact an organization's ability to advocate effectively, with older organizations often having more legitimized voice with government entities (Almog-Bar & Schmid, 2013). Organizations with larger budgets and greater numbers of staff have the ability and capacity to undertake advocacy activities more effectively than smaller organizations (Almog-Bar & Schmid, 2013). Similarly, Almog-Bar and Schmid (2013) posit that financially stable organizations with a well-established infrastructure have more resources to allocate towards advocacy activities; and are often less impacted by changes to government funding. Organizations with leadership committed to advocacy activities, including experienced managers and supportive boards of directors, are more likely to undertake advocacy initiatives (Almog-Bar & Schmid, 2013). Further, the degree to which an organization maintains and participates in collaborative partnerships and coalitions impacts the extent to which they undertake advocacy activities (Almog-Bar & Schmid, 2013). Participation in coalitions enhance an organizations ability to advocacy effectively and with less individual risk. While examples exist of government-funded organizations effectively advocating for policy change, cross-sector collaboration and resource sharing is an emerging trend that strengthens policy advocacy and reduces individual organizational risk (Mulholland, 2010). Finally, advocacy activities are enhanced when organizations include constituents and stakeholders in decision-making and advocacy initiatives (Almog-Bar & Schmid, 2013).

Organizations who want to produce policy level changes require policy capacity, the skill to develop and communicate sound and attainable recommendations to those with policy making power in hopes of influencing policy and decision-making (Mulholland, 2010). Mulholland (2010) posits that policy capacity requires that organizations have politically significant ideas and an understanding of how the government functions and creates policy as well as cooperative relationships with government, stakeholders and constituents and experience with strategic implementation strategies.

It is important to emphasize that in order to undertake policy advocacy, an organization must have a solid understanding of relevant government entities and how they function (Mulholland, 2010). A concrete understanding of how government agencies function in terms of decision-making and policy creation, will improve an organization's advocacy efforts (Mulholland, 2010). Mulholland (2010) states that organizations must recognize and appreciate the culture, values, power, interests, limitations and constraints of government partners and develop relationship with the appropriate government personnel. An effective strategy for enhancing an organizations understanding of government entities is to incorporate volunteers or personnel with government experience into policy advocacy activities (Mulholland, 2010).

Organizations who are interested in undertaking policy advocacy also require the appropriate skills, knowledge capacity and leadership. Mulholland (2010) posits that organizations require research and analytical skills, strategic implementation experience, communication capacity, the ability to build relationships and politically knowledge. Almog-Bar and Schmid (2013) posit that lack of leadership also affects the effectiveness of policy advocacy. Training and leadership development is often required for staff when an organization is planning to commence policy advocacy (Mulholland, 2010).

Effective policy advocacy requires sufficient and appropriate resources. Some human services organizations forgo policy advocacy because they rely on government funding for their basic existence and sustainability (Almog-Bar & Schmid, 2013; Mulholland, 2010). Organizations may adhere to and accept government policies because of funding dependency (Almog-Bar & Schmid, 2013). Organizations may fear that they are biting the hand that feeds when they adopt policy advocacy, which may be seen as confrontational (Almog-Bar & Schmid, 2013; Mulholland, 2010). On the other hand, organizational reliance of government funding provides an opportunity for relationship building with government officials, which can actually enhance policy advocacy initiatives (Almog-Bar & Schmid, 2013).

### 3.18 EVALUATING ADVOCACY IMPACT

Advocacy activities and their intended impact are uncertain as there is no guarantee of success and they are inherently difficult to measure (Barkhorn, Huttner, & Blau, 2013). It can take years for the impacts and benefits of an advocacy strategy to be felt. Contributing change to specific activities is difficult because social change occurs in a complex, chaotic, politically charged system with competing interests and interventions (Barkhorn, Huttner, & Blau, 2013). Almog-Bar and Schmid (2013) explain that system changes are the result of the activities of many players and stakeholders as well as environment factors that are not dictated by a single organization. Consequently, measuring the impact of advocacy activities is challenging from the outset and through its implementation (Almog-Bar & Schmid, 2013). However, evaluation and assessment of an organizations advocacy activities is essential to assess the impact of initiatives, improve advocacy effectiveness, demonstrate value of advocacy activities to stakeholders and make educated decisions about resource allocation for advocacy initiatives (Almog-Bar & Schmid, 2013).

Evaluation of an organization's advocacy activities is vital and will often include assessments of internal and external elements. Internal evaluation factors include the amount of autonomy an organization maintains in its advocacy activities, leadership quality and management authority (Almog-Bar & Schmid, 2013). External evaluation factors include the amount of resources an organization allocates to its advocacy initiatives (Almog-Bar & Schmid, 2013). Additional criteria include the sustainability and long-term commitment to an advocacy issue, policy capability of an organization and the ability of an organization to build and maintain relationships with key policy makers (Almog-Bar & Schmid, 2013). Evaluation of advocacy can also involve examining the influence an organization has over agenda setting and access to

decision-making processes (Almog-Bar & Schmid, 2013). Further, advocacy activities are based on the extent to which an organization succeeds in positively affecting policies that impact their constituents (Almog-Bar & Schmid, 2013). The degree to which an organization is involved in developing policy implementation strategies and monitoring implementation is also a means of evaluating the success of an organization's advocacy campaign (Almog-Bar & Schmid, 2013). Another effective indicator of an advocacy campaign's effectiveness is the ability of an organization to shape the priorities of policy makers and the resource allocations of political institutions (Almog-Bar & Schmid, 2013).

### 3.19 LITERATURE REVIEW SUMMARY

The literature review presents the challenges and barriers to improving special education programs in schools and the benefits of inclusive education approach. Students with special education needs are marginalized in Trinidad and Tobago, which present as social justice issue. Education reform and improvements to special education requires holistic, multi-level solutions, which includes, students, educators, administrators and relevant government entities.

Advocacy is a means of addressing social justice issues, empowering marginalized populations and educating society on salient social challenges. There are many types of advocacy ranging from collaborative to antagonistic. Choosing an advocacy strategy must be based on desired outcomes, organizational capacity, and vision.

## 4.0 METHODOLOGY

### 4.1 METHODOLOGY - QUALITATIVE RESEARCH

The project utilizes a qualitative research methodology, which develops an understanding of the interaction between variables and can inform recommendations for intervention development and strategy implementation (Operario, 2008). The rationale for conducting qualitative research is that it encourages the understanding of the complex relationships between factors that act as barriers to improving special education and advocacy activities in Trinidad and Tobago (Operario, 2008). Furthermore, qualitative research, taps into the knowledge and experience of local stakeholders and organizations so as to identify strategies for effective advocacy campaigns and education reform (Operario, 2008). Finally, qualitative research is appropriate for in depth exploration using small sample (Operario, 2008).

### 4.2 METHOD - KEY INFORMANT INTERVIEWS

The method for the project was key informant interviews with organizations and individuals currently advocating for improved special education in Trinidad and Tobago. Semi-structured interviews were conducted with organizations and individuals undertaking or involved in special education and/or advocacy for special education in Trinidad and Tobago, to contextualize the advocacy experience in Trinidad and Tobago, establish best practices and identify potential advocacy coalitions specific to special education.

### 4.3 SAMPLING

The sampling strategy aligns with what Coyne (1997) describes as selective and purposeful sampling whereby the researcher selects interview participants based on the goals of the research. Selective and purposeful sampling, seeks to engage research participants with knowledge and experience relating to the research question (Coyne, 1997). In the case of advocating for improved special education in Trinidad and Tobago, the research participants included, special educators, organizations working with special needs populations and parents of children with special needs.

### 4.4 INTERVIEW PARTICIPANTS

Research interview participants were identified as leaders in advocacy for special needs issues in Trinidad and Tobago. Semi-structured interviews were conducted with the following individuals/organizations in Trinidad and Tobago.

Mrs. Teresina Sieurnarine - President of the Autistic Society of Trinidad and Tobago

Ms. Toni Blacket-Felix and Mr. Frederick Felix - President, psychologist and founders of Youth Inclusive Play and Education Experience (YIPEE)

Bhawani Persad - President, Consortium of Disability Organizations (CODO)

Meghan Lee-Waterman - Administrator, The Academy of Special Needs

Jaki Armstrong - Founder and Educator, Joy of Learning Resource Centre

Tracy Hutchinson-Wallace - Member, Autism Parents Association of Trinidad and Tobago (APATH)

Joycelyn Roberts - Past Secretary and Board Member - Autism Tobago

#### 4.5 RESEARCH QUESTIONS

The advocacy experience of the selected interview participants, was assessed through the following interview questions:

1. What if any contextual issues specific to Trinidad and Tobago either limit or enhance your organizations or your individual advocacy initiatives?
2. What advocacy activities does your organization or do you personally undertake and which do you feel are most effective and why?
3. Is there concern that advocacy can be seen as controversial or confrontational and does this impact the extent to which your organization or you personally advocate?
4. To what extent do you advocate as part of a coalition?
5. Has your organization or you personally undertaken policy advocacy and to what extent has your lobbying campaign been effective?
6. How do you assess the impact of your advocacy activities?

#### 4.6 DATA ANALYSIS

The data collected from key informant interviews was compiled and analyzed using a framework analysis. Framework analysis as described by Lacey and Luff (2001) and Ritchie and Spencer (2002) is a suitable method for identifying information for the development of recommendations, which is purpose of this project. The researcher became familiar with data, identified emergent themes, mapped and interpreted patterns, associations, concepts and explanations within the data (Lacey & Luff, 2001, Ritchie & Spencer, 2002). Through systematic data analysis, emergent themes from key informant interviews guided the development of a strategic advocacy plan for UWTT (Lacey & Luff, 2001; Ritchie & Spencer, 2002).

#### 4.7 LIMITATIONS AND DELIMITATIONS

Many of the research interview respondents were focused specifically on advocacy for children with Autism. Autism is one form of special needs and/or learning disability however; it does not represent the multitude of other special needs or learning disabilities prevalent in students. As such the researcher had to extrapolate data findings to broader understanding of special needs. However, the fact that there is not a broad understanding or advocacy effort for all special needs occurrences corroborates the need for advocacy strategy that is more encompassing.

## 5.0 FINDINGS

The findings chapter will outline the data collected through the key informant interviews.

### 5.1 DEFINITION OF ADVOCACY PROVIDED TO RESEARCH PARTICIPANTS

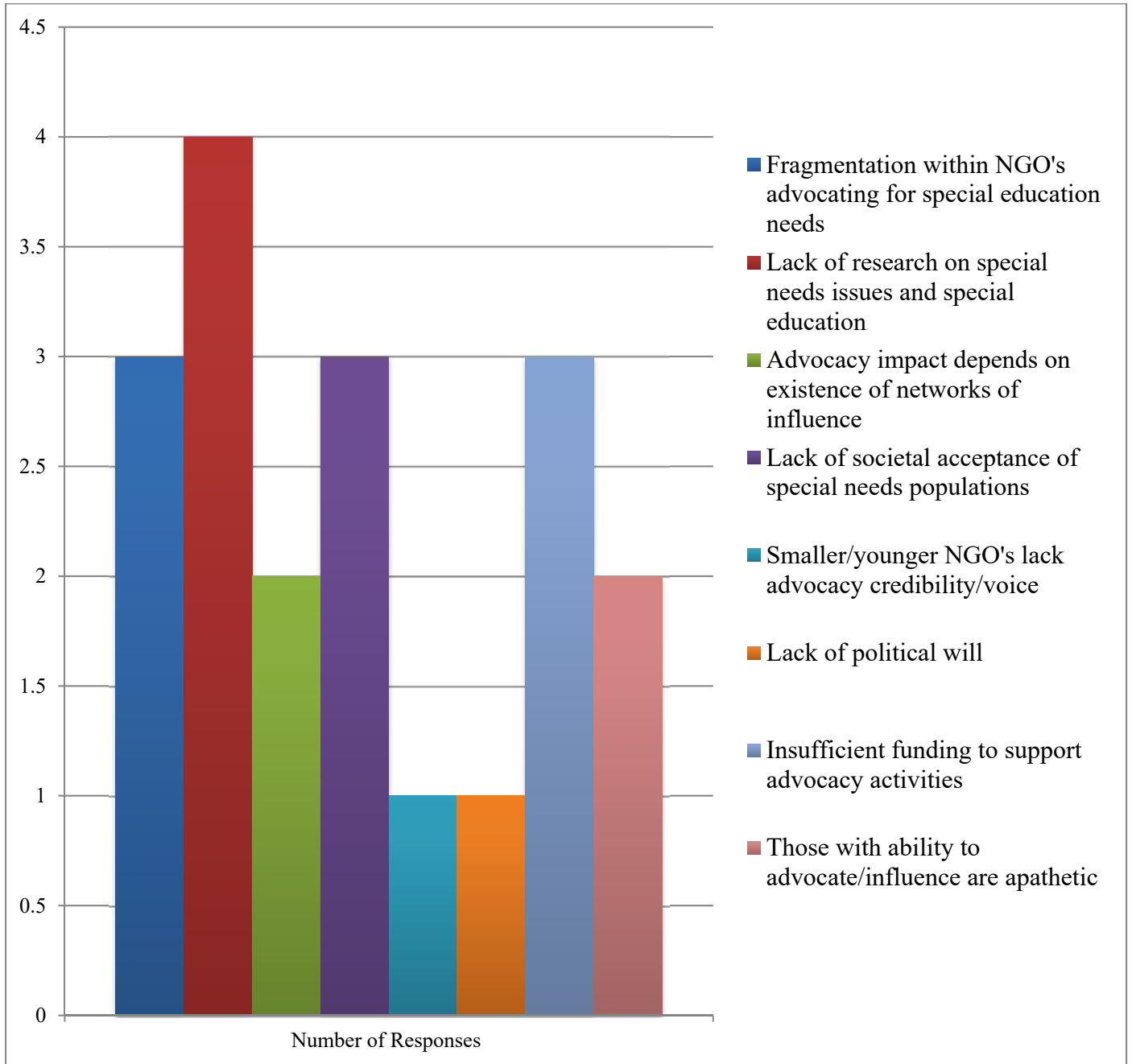
Advocacy was defined to the interview participants as activities that challenge social justice issues in an attempt to bring about social change, empowering marginalized populations to enhance their quality of life (Almog-Bar & Schmid, 2013; Donaldson, 2008; Mellinger, 2014). The definition of advocacy was provided to the key informant interviewees so as to broaden the often-limited definition of advocacy held by practitioners.

### 5.2 CONTEXTUAL ISSUES- ENHANCING OR LIMITING ADVOCACY ACTIVITIES IN TRINIDAD AND TOBAGO

Interview participants identified a number of factors that limit advocacy activities in Trinidad and Tobago with regards to improving special education. The following are factors that limit advocacy activities presented from most reported to least:

1. Lack of research on special needs issues and special education
2. Lack of societal acceptance of special needs populations
3. Insufficient funding to support advocacy activities
4. Fragmentation within NGO's advocating for special education needs
5. Advocacy impact depends on existence of networks of influence
6. Those with ability to advocate/influence apathetic
7. Lack of political will
8. Smaller/younger NGO's lack advocacy credibility and voice

TABLE 1: CONTEXTUAL FACTORS LIMITING ADVOCACY ACTIVITIES IN TRINIDAD AND TOBAGO



Three of the seven interview respondents mentioned that Trinidad and Tobago ratified the United Nations Convention on the Rights of Persons with Disabilities in June of 2015. The ratification

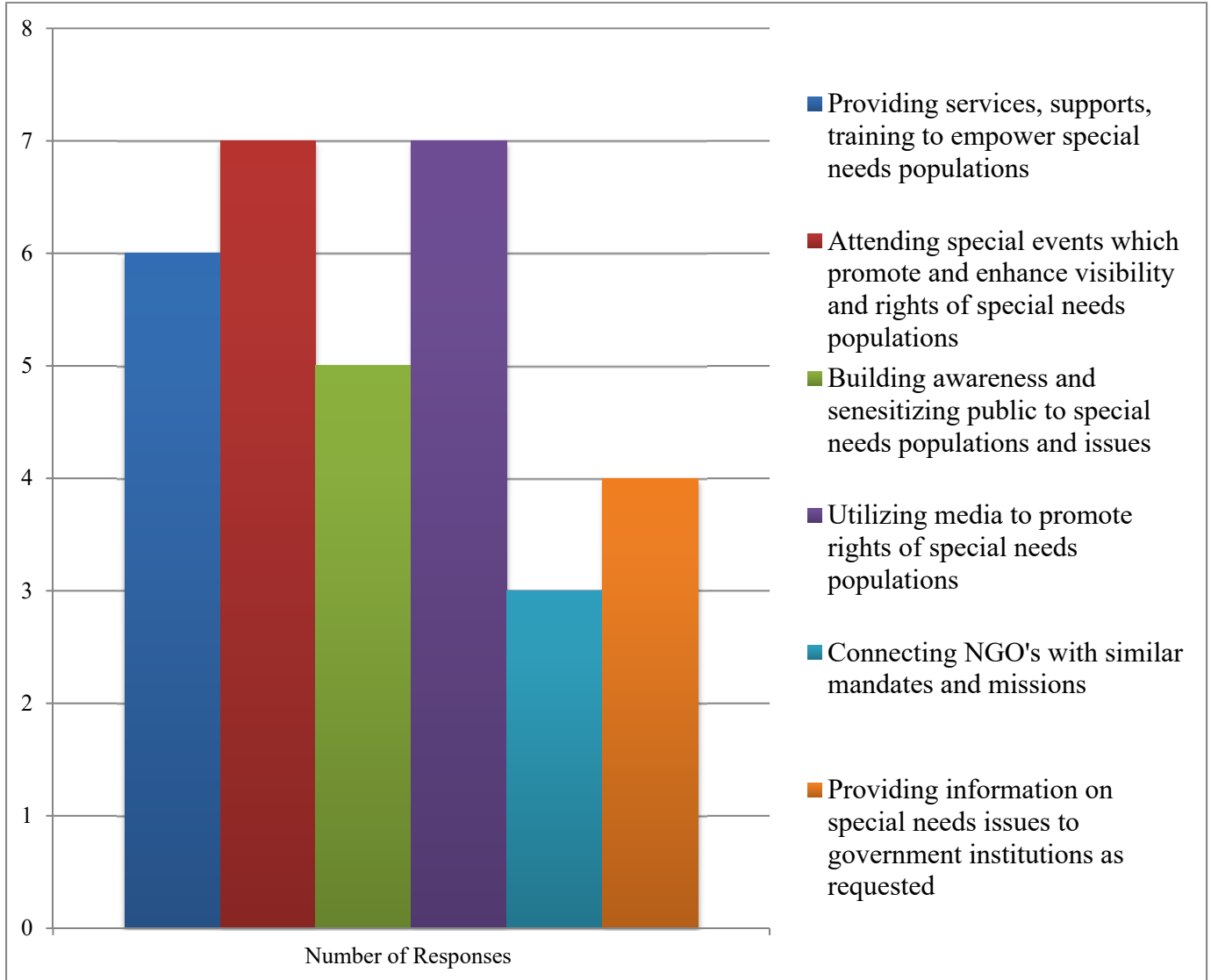
was seen by respondents as a binding commitment of the government of Trinidad and Tobago to provide for the rights and needs of the special needs population, bolstering advocacy activities. One respondent identified the increase in media forums as a means to enhance advocacy activities, specifically social media, as an opportunity to create public awareness around special needs issues.

### 5.3 ADVOCACY ACTIVITIES UNDERTAKEN BY ORGANIZATIONS AND INDIVIDUALS

Respondents presented several advocacy activities, which they undertake to advocate for special needs populations and improving special education. The following list presents advocacy activities currently undertaken by nonprofits from most prevalent to least:

1. Attending special events which promote and enhance the visibility and rights of special needs population
2. Utilizing media to promote rights of special needs population
3. Providing services, supports, training to empower special needs populations
4. Building awareness and sensitizing public to special needs populations and issues
5. Providing information on special needs issues to the government as required
6. Connecting NGO's with similar mandates and missions

TABLE 2: ADVOCACY ACTIVITIES CURRENTLY UNDERTAKEN BY INTERVIEW RESPONDENTS



#### 5.4 IS ADVOCACY CONTROVERSIAL?

Interview participants were asked to what extent undertaking advocacy activities was considered controversial or adversarial. More than half of the respondents believed that for advocacy activities to be effective, they must be: solution-oriented, collaborative, inclusive of multiple stakeholders and must be based on sound analysis, research and facts. The other respondents believed that advocacy could be seen as confrontational, and believed that more forceful advocacy tactics were required to bring about change. It is interesting to note, that newly established/smaller NGO's and self-advocating individuals were more willing to adopt

adversarial advocacy tactics because they were less reliant on government funding and felt they had less to lose.

### 5.5 ADVOCATING AS A COALITION

The Consortium of Disability Organizations (CODO) is an umbrella organization with the mandate of coordinating nonprofit organizations and special interest groups around special needs and disability rights and issues (Bhawani Persad, Personal Communication, November 24, 2015). Three of the respondents interviewed represented organizations that were members of CODO. However they questioned CODO's ability to mobilize member-organizations around a common advocacy goal and strategy due to the existing division between the nonprofits advocating for special needs. Four respondents and current CODO members believed that advocating as part of coalition would be more effective than a fragmented approach; as one message and one voice is more effective than many voices with different agendas.

### 5.6 POLICY ADVOCACY EXPERIENCE

Two of the seven respondents had some experience in policy advocacy. The Autism Society of Trinidad and Tobago and the Consortium of Disability Organizations had both participated in committees with government bodies, providing recommendations based on their knowledge and experience working with special needs populations.

### 5.7 ASSESSING ADVOCACY IMPACT

The last interview question explored the ways in which organizations and individuals assess their advocacy activities' impact. Four of the seven respondents did not have any means of measuring their advocacy impact. While two of the respondents evaluated their impact based solely on their membership growth and program participation. Finally, four of the seven respondents believed that public awareness of special needs rights and issues is expanding in Trinidad and Tobago, and that some change of attitudes towards the special needs community is occurring.

## 6.0 DISCUSSION AND ANALYSIS

Improving education for special needs students in Trinidad and Tobago is a complex and overwhelming task. As discovered in the literature review and research interviews there are numerous barriers to education reform. Barriers include discrimination towards special needs persons, lack of governmental will, absence of relevant policy, poor policy implementation, insufficient research on special education best practices, lack of leadership, training and professional development at all levels of the education system, inadequate/non-existent diagnostic services and insufficient resources for inclusion of special needs students in the regular school system. Advocacy is a strategy for improving education for special needs students but is similarly complex in terms of choosing an effective approach and determining an appropriate leverage point.

### 6.1 CONTEXTUAL FACTORS - LIMITING ADVOCACY ACTIVITIES IN TRINIDAD AND TOBAGO

There are several factors specific to Trinidad and Tobago, which limit special education advocacy effectiveness. The first and probably most detrimental factor is the lack of societal acceptance and understanding of persons with disabilities and special needs in Trinidad and Tobago (Conrad, Paul, Bruce, Charles, & Felix, 2010; Peters et al., 2008; Paul, 2011; De Lisle, Seecharan, & Ayodike, 2010). Education reform is more likely to occur as a result of socio-political pressure and community-based advocacy (Barkhorn, Huttner & Blau, 2013; Pedro & Conrad, 2006). Therefore, if the majority of the population is apathetic to special needs persons and equal educational rights it is unlikely that the government will feel compelled to address special education needs. Perhaps this is a contributing factor to the past rhetoric and inaction of the government in terms of education reform and improvement. Building the capacity of citizens and their understanding of human rights and social justice issues transforms an indifferent population into one that is aware and passionate about addressing salient issues (Fox, Helweg, & Hansen, 1997). As such, the ability to transform paradigms and strongly held societal beliefs with regards to special needs persons is an effective and fundamental leverage point for bringing about change in the education system (Meadows, 1997).

Lack of research specific to special needs population rights, issues, needs and education is another substantial barrier to education reform and advocacy. Without sound, locally based research on the occurrence of special needs, education best practices and effective advocacy strategies, how can a system implement effective change? An organization that undertakes advocacy is most effective when it presents a viable alternative or solution that is based on facts, data and solid analysis (Fox, Helweg, & Hansen, 1997). Therefore the lack of research identified in the literature review and in the research interviews is a fundamental barrier to advocacy for improving special education in Trinidad and Tobago.

Findings in the literature review and research interviews also identify lack of funding as a barrier to advocacy. At the most basic level, an advocacy campaign requires financial resources. Many human service organizations undertake advocacy in addition to their core activities, and as such,

funding for advocacy may be limited or non-existent. Furthermore, due to dependency on government funding, organizations may forgo advocacy activities, which may be seen as adversarial towards their main funding source (Almog-Bar & Schmid, 2013; Mulholland, 2010). Finally, lack of funding is and will be a reality impacting the viability of any proposed solution for education reform. While an organization might advocate for inclusive education, lack of funding within the school system means that the solution will not be sufficiently resourced and financially supported.

Division and fragmentation among nonprofit organizations dedicated to special needs persons is another identified barrier to advocacy specific to Trinidad and Tobago. While many interview respondents agreed that a united voice, common vision and shared resources would enhance advocacy activities, relationships between some of the nonprofits were strained. A coalition is a form of developmental advocacy which can lead to instrumental advocacy in that it represents the interests of marginalized populations and can influence decision-making and policy direction (Fox, Helweg, & Hansen, 1997). The Consortium of Disability Organizations represents a possible coalition for interested nonprofits to advocate together for improved special education. However, it was not seen as effective entity in bringing together relevant stakeholders around a common vision.

Similar to coalitions is what Mulholland (2010) describes as, "un-organizations." Un-organizations collaborate across sectors as communities of purpose, with shared leadership, common interests, focused on communication, engagement and action (Mulholland, 2010). At present the Consortium of Disability Organizations has a membership of solely nonprofit organizations. The cross-sector component of un-organizations aligns nicely with the UWTT collective impact model, which also encourages cross-sector collaboration to address complex social issues Kanis and Kramer (2011).

## 6.2 CONTEXTUAL FACTORS - ENHANCING ADVOCACY IN TRINIDAD AND TOBAGO

Education reform requires government policy support and legislation that uphold a commitment to inclusive education and equity for special needs students (Peters et al., 2008). Research interview respondents identified the ratification of the United Nations Convention on the Rights of Persons with Disabilities in June of 2015 as a positive step, compelling the government to provide for the rights and freedoms of persons with disabilities. It would appear that the ratification is a window of opportunity through which organizations can advocate for equal educational opportunities for special needs students. Furthermore, in January and February of 2016, the Ministry of Education undertook a National Consultation on Education whereby stakeholders and community members throughout Trinidad and Tobago could share their concerns and recommendations for improving the education system (National Consultation on Education, 2016). Inclusive education was an agenda item to be discussed as part of the consultation process, which signifies that some stakeholders recognize the benefit of an integrated education approach (National Consultation on Education, 2016).

Mulholland (2010) states that, organizations must recognize and appreciate the culture, values, power, interests, limitations and constraints of government partners and develop relationship with the appropriate government personnel. Barkhorn, Huttner and Blau (2013) concur that advocacy campaigns are more effective when allies and or coalitions as well as champions and decision-makers support proposed solutions. Interview respondents agreed that effective advocacy requires networks of allies and support for recommended solutions from those with power and influence. The UWTT is fortunate in that it is a well-known organization in Trinidad and Tobago with a credible voice. As such, the UWTT, like many other nonprofit human service organizations, is more likely to undertake cooperative advocacy activities, building relationships and trust with government bodies to influence policy and decision-making (Almog-Bar & Schmid, 2013; Garrow & Hasenfeld, 2014). In this sense, the UWTT is well positioned to be a legitimate and effective advocate for improving special education.

The use of social media as a tool and forum for advocacy is becoming more widely utilized and successful in terms of building awareness and support for social justice issues. All of the interview respondents utilized social media to build awareness of social justice issues affecting the special needs population. Looking again at the importance of shifting societal attitudes towards special needs persons, social media is an effective medium for building awareness and sensitizing the general public.

### 6.3 TYPES OF ADVOCACY

It would appear based on the research interviews that currently organizations are undertaking advocacy by providing services to special needs persons and building public awareness around special needs issues. Service provision and awareness of special needs issues fall under transformational and developmental advocacy in that they seek to build constituent capacity and generate awareness of social justice issues impacting the special needs population in Trinidad and Tobago (Fox, Helweg, & Hansen, 1997). Service provision can also be seen as advocating for organizational benefits as it may concentrate on improving the sustainability of the organization and enhancing services and circumstances for the specific constituents (Garrow & Hasenfeld, 2014). An organization may additionally choose to advocate for sustainable funding to provide services to marginalized populations (Garrow & Hasenfeld, 2014). While service provision is effective in developing the individual capacity of special needs persons, it does not address the macro-level, systemic causes of inequality that exists for the marginalized population (Fox, Helweg, & Hansen, 1997).

The research identified that organizations often choose an advocacy strategy based on where they view the intended origin of the issue (Garrow & Hasenfeld, 2014). Is it fair to say that organization's providing services view special needs issues as a personal deficit, requiring services that improve that specific individual's capacity (Garrow & Hasenfeld, 2014)? Or do organizations view service provision as a tool to empower special needs persons to advocate and address issues that impact them? Which is, ultimately, an essential component of a holistic advocacy strategy, and one that aligns with the core functions of many nonprofit organizations.

Socialization and building awareness of social justice issues impacting special needs populations is a type of developmental advocacy in that it attempts to strengthen civil societies and promote democracy. Socialization and public education is more focused on providing social benefits, addressing broad social justice issues and attempting to transform power imbalances at the macro-level (Garrow & Hasenfeld, 2014). System wide change, such as education reform, requires citizen support, which can be developed through public education around special needs issues and education system alternatives that better meet the needs of all citizens.

Persons with disabilities and special needs have historically and currently, suffer from discrimination and marginalization in Trinidad and Tobago (Conrad, Paul, Bruce, Charles, & Felix, 2010; Paul 2011). The marginalization of special needs persons combined with the inherently elitist and segregated education system has meant that many special needs students have not had access or the opportunity to an equal and inclusive quality education. Socialization and public awareness as an advocacy strategy can bring attention to the failures of education system and social justice issue that exist for special needs students.

Papa Bois is a local conservation organization in Trinidad and Tobago, which undertook a successful socialization campaign in March, 2014, utilizing a public awareness advocacy strategy to promote shark protection (Deacon, 2013; McFadden, 2014). The multi-year conservation campaign has focused on public education, building awareness of the shark crisis, campaigning on the streets, and utilizing traditional and social media to shift public sentiment towards sharks (Deacon, 2013; Devitt, 2013; McFadden, 2014). Papa Bois has successfully built awareness of shark conservation among the local population and garnered media attention both locally and internationally with reports of their shark conservation campaign receiving press coverage in the Washington Post and Associated Press (Boodram, 2014; Deacon, 2014). Building upon this momentum and with public support, Papa Bois plans to lobby the government to make waters of Trinidad and Tobago a shark sanctuary (Boodram, 2014; McFadden, 2014).

Policy advocacy, although extensively reviewed in relevant advocacy literature, does not seem to be undertaken by many nonprofit organizations in Trinidad and Tobago. A few of the interviewed respondents had some impact on policy creation through what Fox, Helweg and Hansen (1997) call educational advocacy, providing research, analysis and data to government entities in hopes of influencing priorities, policies and decision-making. However, the respondents were unsure as to what extent their experience, knowledge and research was utilized by government entities.

While policy advocacy is one of the most effective means of producing changes when faced with complex, system-wide issues, like education reform, it is also complex, requiring substantial commitment and resources (Barkhorn, Huttner, & Blau, 2013). Policy advocacy requires policy capacity, the skill to develop and communicate sound and attainable recommendations to those with influence in hopes of affecting policy and decision-making (Mulholland, 2010). Furthermore, organizations must have a solid understanding of how government agencies

function in terms of decision-making and policy creation (Mulholland, 2010). Mulholland (2010) posits that organizations require research and analytical skills, strategic implementation experience, communication capacity, the ability to build relationships and political knowledge. Understandably, policy advocacy can be a major undertaking for an organization especially when it is not part of their core mandate or function. Perhaps that is why few organizations in Trinidad and Tobago actively engage in policy advocacy for improving special education.

Impacting political policy occurs when civil society has the will, capacity and access to influence decision-making, communicate required reforms, shape and monitor policy implementation and evaluate and make changes as required (Fox, Helweg, & Hansen, 1997). It was previously mentioned that transformational and developmental advocacy are preconditions for instrumental advocacy or policy advocacy (Fox, Helweg, & Hansen, 1997). As such, advocacy that focuses on empowering marginalized populations and generating mass public support for desired changes, may be required before policy advocacy can be effective. Conversely, Fox, Helweg, and Hansen, (1997) posit that successful policy advocacy can reinforce and bolster transformational and developmental advocacy activities as well.

#### 6.4 IS ADVOCACY CONTROVERSIAL?

An organization that undertakes advocacy must be aware that it can be seen as controversial or adversarial. Representing the interests of marginalized members of societies and advocating for social change will not always be popular. Some division existed between interview respondents with regards to the effectiveness of cooperative versus adversarial advocacy tactics. However, many respondents agreed that advocacy strategies must be solution-focused and collaborative. Collaborative strategies are most effective where agreement exists between political institutions and civil society as to the reform required, and parties work collaboratively to bring about the desired change (Fox, Helweg, & Hansen, 1997). However, local elites in Trinidad and Tobago have benefited from the segregated and elitist school model that currently exists and as such, it is unlikely that education reform and inclusive education is a common goal for all stakeholders. Alternatively, modeling advocacy strategies or pilot programs are also considered a cooperative form of advocacy as they demonstrate successful alternatives or solutions to complex issues (Fox, Helweg, & Hansen, 1997). The UWTT collective impact pilot program in Fifth Company is in itself an example of a modeling strategy. Success of the UWTT pilot project could be shared with government officials; policy makers and the general public and scaled up to produce broader impact and change. Cooperative advocacy also known as administrative advocacy is seen as a less confrontational means of producing policy changes and takes the form of cooperative relationships with government entities and policy makers (Almog-Bar & Schmid, 2013). Administrative advocacy includes meetings with government officials, participating on advisory and planning committees, providing information to government agencies and networking with government personnel, some of which is already taking place with the better-known nonprofits in Trinidad and Tobago (Almog-Bar & Schmid, 2013). Nonprofit human service organizations are more likely to undertake cooperative advocacy activities, building

relationships and trust with government bodies to influence policy and decision-making (Almog-Bar & Schmid, 2013; Garrow & Hasenfeld, 2014). It would make sense that the UWTT would lean towards more cooperative advocacy strategies based on its status and position within Trinidad and Tobago.

On the other hand, some interview respondent's thought that more forceful advocacy strategies were required to move special needs education improvement forward. Outsider advocacy tactics are a more aggressive form of advocacy, which include public education, use of mass media, protests and boycotts to bring about system reform (Almog-Bar & Schmid, 2013). More aggressive advocacy strategies include persuasive advocacy, the mobilization of mass support for an issue through education, awareness building and the development of coalitions, which can force the hand of political institutions to adopt the desired reform recommendations (Fox, Helweg, & Hansen, 1997). Public education and awareness building of special needs issues and special education is required to build understanding and social acceptance of person with special needs. However, advocacy through public awareness might require a critical look at the current education system, which may be seen as adversarial towards members of the Ministry of Education and some members of society. With that said, advocacy through public education is a viable option for nonprofits not wishing to be seen as adversarial if the message is careful crafted, solution-focused, and encourages an inclusive society. It is interesting to note that the literature defines coalitions as an aggressive advocacy strategy. At the time of the research interviews, respondents did not identify a coalition as specifically adversarial. Perhaps, a coalition, which is actively targeting policy development and or organizing protests is what the literature was eluding too. At present it would not appear that the Consortium for Disabilities Organization is seen as particularly confrontational.

#### 6.5 ASSESSING ADVOCACY IMPACT

Advocacy impact is inherently difficult to assess and evaluated as results occur over a long period of time, and any number of contributing factor can cause change (Barkhorn, Huttner, & Blau, 2013). Almog-Bar and Schmid (2013) explain that system changes are the result of the activities of many players and stakeholders as well as environment factors that are not dictated by a single organization. Interview respondents discussed some informal assessment methods utilized to measure the impact of their advocacy activities. However, the literature encourages the use of formal evaluation and assessment methods as a means of measuring the impact of advocacy initiatives, improving strategy effectiveness, demonstrating value of activities to stakeholders and to assist with decisions-making with regards to resource allocation (Almog-Bar & Schmid, 2013). Assessing service provision as an advocacy activity can be achieved by measuring the number of program participants, their experience, and improvements in participant's quality of life before, during and after a program. It would be more challenging to measure changes is societal attitudes as the result of a public education campaign. Changes in policy due to advocacy activities can be assessed easily however; successful implementation of

policy requires more complex evaluation methods. While deciding on an advocacy strategy, an organization should take into account the importance of assessing initiative outcomes.

## 6.6 ADVOCACY LEVERAGE POINTS IN TRINIDAD AND TOBAGO

The literature and research interviews presented several points of leverage for advocating for improved special education in Trinidad and Tobago. The following list describes possible focus areas for advocacy activities for the UWTT:

### **Providing Funding/Service Provision**

Providing funding to other service providers and nonprofits is included as a potential advocacy activity for the UWTT because it aligns with their core function and mandate. The UWTT might not have the capacity to undertake advocacy activities on their own however, they could support other organizations in advocating for improved special education.

- Providing funding and training for teachers, administrators and parents with regards to special needs awareness, special education strategies, curriculum development, leadership and inclusive education.
- Advocating for and providing funding for diagnostic services for children with special needs
- Providing funding for intervention services and special education assistances in schools
- Provide funding to organizations undertaking advocacy activities
- Provide/undertake research with regards to special education in Trinidad and Tobago

### **Public Awareness Campaigns**

- Undertake public awareness campaign to educate the public on special needs issues and the importance of special education in schools.
- Promote the benefits of inclusive education

### **Coalition**

- Join the Consortium of Disability Organizations coalition
- Provide training and leadership within the coalition to improve effectiveness and advocacy function
- Organize cross-sector coalition to advocate specifically for special education in Trinidad and Tobago

### **Policy Advocacy**

- Policy advocacy that legislates inclusive education in Trinidad and Tobago
- Participate in the Ministry of Education committees regarding special education

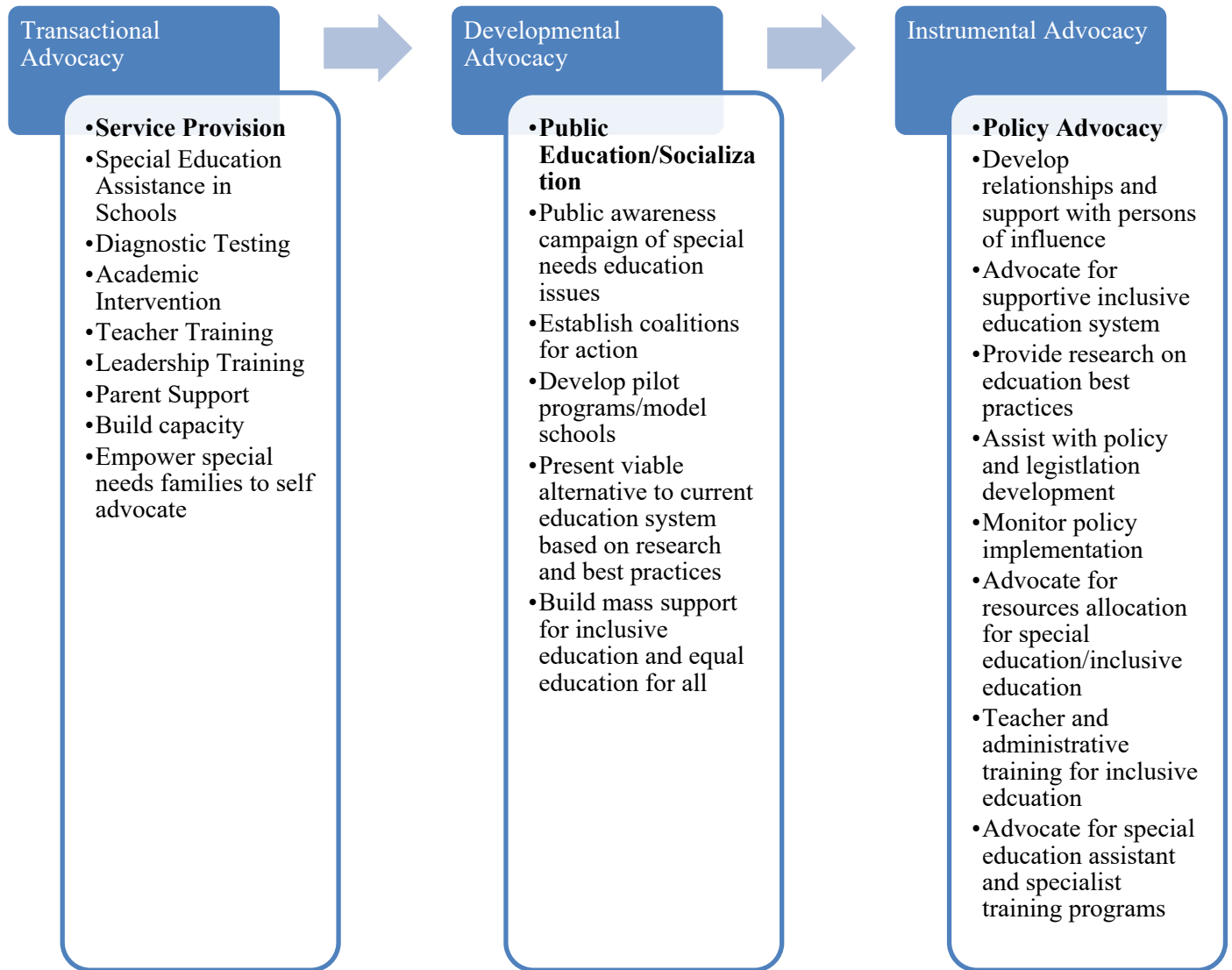
- Report on outcomes of the Fifth Company Collective Impact Pilot Project as a potential model for improving special education in Trinidad and Tobago

It is important to remain cognizant of the interconnecting forms of exclusion and discrimination for special needs families in Trinidad and Tobago. Low-income families with special needs children often do not have the financial resources for diagnostic assessments, therapy interventions and or private education which at present can better meet the needs of special needs students. It is necessary to include persons/families with special needs as well as relevant stakeholders in the development of an advocacy campaign so that those directly affected by the initiatives agree with direction and intended outcomes of the activities.

#### 6.7 CONCEPTUAL FRAMEWORK FOR ADVOCACY TO IMPROVE SPECIAL EDUCATION IN TRINIDAD AND TOBAGO

The conceptual framework outlined in Figure 1 theorizes the steps, stages and processes required to improve special education in Trinidad and Tobago. The advocacy framework begins with service provision as a transactional advocacy outcome, working at the micro-level to empower, support and train families, teachers and administrators. Transactional advocacy is an appropriate starting point as it provides families, teachers and other early adopters with skills and capacity to share their stories and experiences and address issues on a smaller scale until macro-level change occurs. The subsequent step involves public education and socialization of the general public with regards to special needs issues and special education options building mass support for inclusive education and education for all. The developmental advocacy stage should also include research on viable education models, policies required, implementation strategies as well as development of coalitions for action. Once, mass support for education reform is created policy advocacy will be more successful as government officials will be compelled to respond to concerns and social justice issues that exist due to lack of support for special needs students. Instrumental advocacy address system level barriers to education reform and as such should include, relevant stakeholders, local research, policy development, implementation monitoring and training programs to support reform initiatives.

FIGURE 1: CONCEPTUAL FRAMEWORK FOR ADVOCACY TO IMPROVE SPECIAL EDUCATION IN TRINIDAD AND TOBAGO

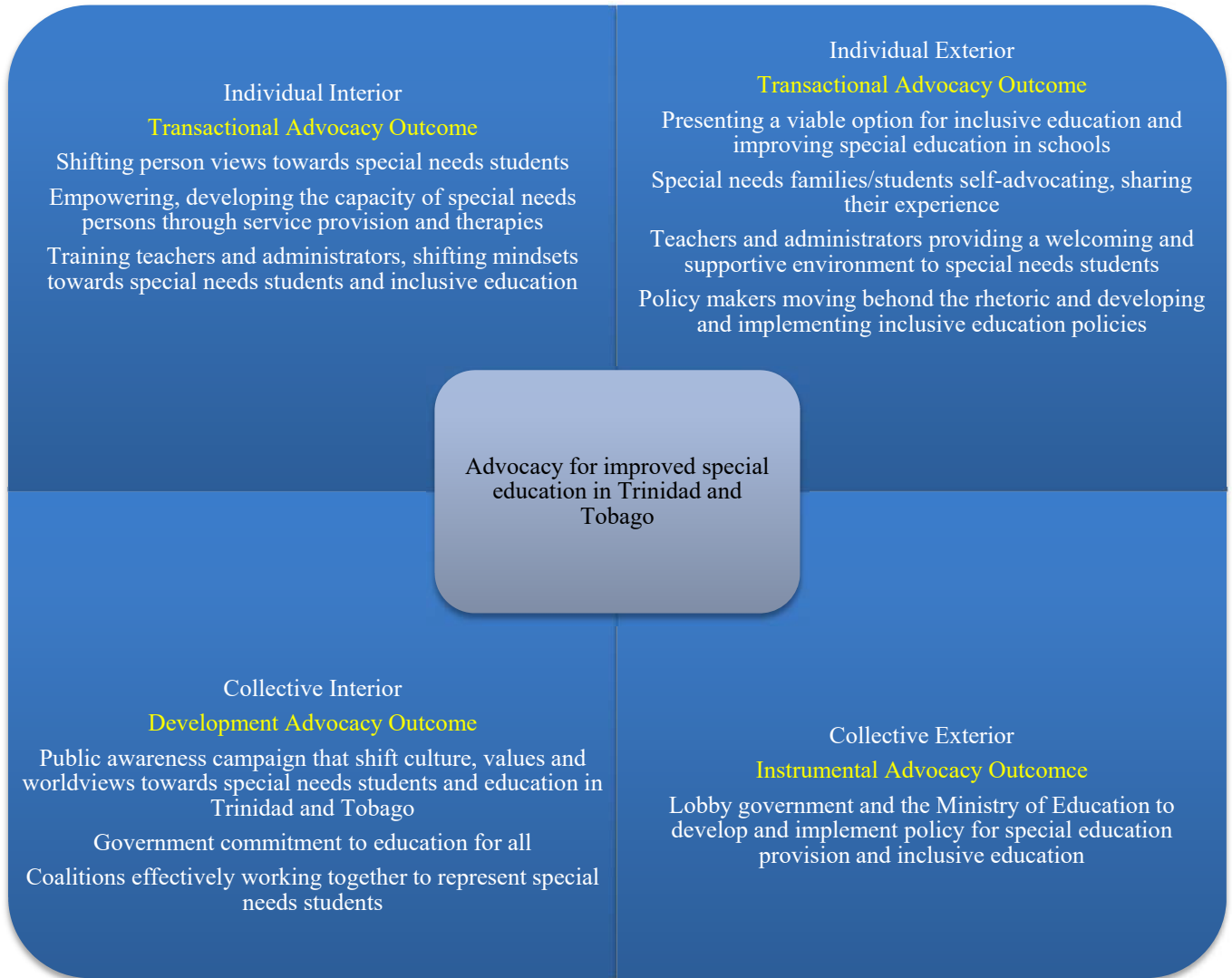


The above conceptual framework aligns with Esbjorn-Hargens (2012) integral framework. Advocacy for improved special education in Trinidad and Tobago can be analyzed utilizing an integral approach, which takes into account the complexity of the phenomenon (Esbjorn-Hargens, 2012). The integral approach provides a lens to examine the four quadrants of the quadrivium, the individual internal, individual behaviour, cultural/worldviews and systems, realizing that sustain change requires transformations in all four quadrants to be truly successful (Esbjorn-Hargens, 2012). By placing advocacy for improved special education in Trinidad and Tobago at the centre of the quadrivium, analysis of the potential advocacy outcomes can occur

(Esbjorn-Hargens, 2012). Focusing on the individual interior quadrant, it is possible to examine advocacy strategies that can shift personal views and awareness of special needs issues. Advocacy strategies, which build the capacity and empower special needs persons to self-advocate are targeting in the individual interior quadrant. Similarly, a teachers understanding and skill in educating special needs students would also be contained in the upper left hand quadrant. In the individual exterior quadrant, advocacy strategies would be focused on shifting the behaviour of special needs families, teachers, administrators and policy makers. Cultural values, views and norms are targeted in the collective interior quadrant and as such, public awareness campaigns focus on bringing special needs issues into the public realm and shifting the culture, values and worldviews towards the population (Esbjorn-Hargens, 2012). Finally, in the systems quadrant or collective exterior, advocacy activities would target the government and Ministry of Education to establish and implement inclusive education policy (Esbjorn-Hargens, 2012).

Education reform is a complex, multi-level issue that requires a comprehensive, integrated solution and the integral approach is an effective lens from which to view potential advocacy strategies and leverage points for change (Esbjorn-Hargens, 2014). As Esbjorn-Hargens (2012) states, the four quadrants exist at the same point in time and can be acted upon simultaneously. However, access, opportunity and prioritization of advocacy strategies that target the individual interior and collective exterior are more salient leverage points as identified in Figure 1.

*FIGURE 2: INTEGRAL FRAMEWORK OF ADVOCACY OUTCOMES FOR IMPROVED SPECIAL EDUCATION IN TRINIDAD AND TOBAGO*



## 7.0 OPTIONS TO CONSIDER AND RECOMMENDATIONS

Several advocacy options will be presented in the following section. The options represent potential advocacy strategies that the UWTT could undertake to improve special education in Trinidad and Tobago. The benefits and limitations, implications and consequences, organization capacity required and effectiveness and efficiency of each option will be examined.

### 7.1 OPTION 1 - PUBLIC AWARENESS CAMPAIGN

The UWTT could undertake a public awareness campaign highlighting the issues that exist for special needs students in schools and the consequences of not addressing special education in Trinidad and Tobago. Messaging is very important in any public awareness campaign and as such, the focus should be on promoting the rights of special needs students in Trinidad and Tobago. A possible option is utilizing the UWTT collective impact pilot project as a model, sharing the success of the project in improving special education in a specific community. In this way the UWTT can share its successes, and achievements as well as present viable strategies to address special needs education in a solution focused, non-confrontational way. The campaign could include posts on social media, a short video as well as a public service announcement on local television. Cross-sector collaboration could include private sector supporters displaying the public service announcement in places of business.

System wide change, such as education reform, requires citizen support, which can be developed through public education around special needs issues and education system alternatives that better meet the needs of all students. The hope is that through a public awareness campaign, a dialog could be started and the general public educated on issues affecting the special needs community.

#### *Benefits of Option 1*

- Expand societal understanding and address apathy towards special needs students and issues affecting them
- A means of promoting the achievements of the UWTT collective impact pilot project
- Demonstrating support for special needs community
- Utilizes the UWTT visibility and credibility as a voice for special needs issues

#### *Limitations of Option 1*

- Cost associated with developing a video or public service announcement
- Requires human resources to develop and implement campaign
- The UWTT could be seen as condemning the current education system
- Some members of society, school personnel and government agencies could perceive a public awareness campaign that illustrates the failures and or limits of the current education system as confrontational.

### *Implications of Option 1*

- Requires commitment of special needs students and families to share their experiences and issues
- Requires that the UWTT collective impact pilot project was successful in reducing high school dropout rates and supporting special needs students academically
- Requires that the UWTT Board of Directors and Executive Director support a public awareness campaign
- Requires technical expertise in video production, social media and media relations
- Assessment and evaluation of an advocacy public awareness campaign is complex as it is difficult to monitor and track changes in societal attitudes towards the special needs community.

### *Consequences of Option 1*

- Improved visibility and awareness of special education and issues affecting special needs and marginalized students.
- Educational stakeholders and general public educated on the importance of inclusion and equality in education system.

## 7.2 OPTION 2 - PROVIDE FUNDING TO AN ADVOCACY ORGANIZATION

The UWTT could provide funding for an organization to undertake advocacy for improving special education in Trinidad and Tobago. An advocacy organization or coalition with a focus on special education could apply for funding and undertake an advocacy campaign to improve special education. The organization could undertake advocacy as service provision, providing services that build the capacity of special needs families and students and or take on a public awareness campaign or focus on policy advocacy.

### *Benefits of Option 2*

- Aligns with UWTT core function as an organization that mobilizes funds to support organizations carry out their mandate.
- Does not require in house advocacy expertise
- Reduces the risk of being seen as confrontation as the UWTT is not the directly undertaking advocacy activities
- Utilizes the skills, experience and assets that exist within other organizations

### *Limitations of Option 2*

- The UWTT may need to compromise with the implementing organization with regards to the direction, outcomes and impact of the advocacy campaign.

### *Implications of Option 2*

- Requires an organization with skills, knowledge and focus to undertake advocacy role
- Requires available funds
- Requires processes for the application, selection and evaluation of an advocacy organization and campaign

#### *Consequences of Option 2*

- Responsibility for the outcomes and success of the advocacy campaign resides with the implementing organization.

#### 7.3 OPTION 3 - ADVOCACY THROUGH RESEARCH

The UWTT collective impact project is a form of community-based research and as such project findings and data should be shared with the Ministry of Education, enhancing decision-making in terms of education reform in Trinidad and Tobago. With that said, the research finding and literature review, suggest that local, context specific research on special needs occurrence, rights and inclusive education best practices is grossly lacking in Trinidad and Tobago. As such, the UWTT could become undertake additional research projects, that could guide educational reform. The UWTT could undertake research directly or provide funding for research by an outside organization.

#### *Benefits of Option 3*

- Research is a logical first step in establishing an advocacy direction. Educational reform lacking research and analysis in the local context is rarely successful.
- The UWTT has some experience and capacity for undertaking research and has already conducted some research on special education and education reform.
- Research is a means of determining best practices and may be received by the Ministry of Education as a collaborative means of advocacy.

#### *Limitations of Option 3*

- Research takes time, commitment, expertise, human capacity
- The ability to evaluate the impact of the research on education reform will occur over a longer time period

#### *Implications of Option 3*

- If the UWTT undertakes research in house, staff expertise and time is required
- If an outside organization undertakes research, time and funding is required

#### *Consequences of Option 3*

- There is no guarantee that research will be reviewed and included in policy creation, decision-making and education reform.

- While conducting research education reform can occur making research obsolete

#### 7.4 OPTION 4 - COALITION FOR ADVOCACY

The final option for consideration is for the UWTT to join an existing coalition or create a coalition for advocating for improved special education. A coalition is an effective means of strengthening representation and advocacy as many organizations join together with a shared vision and voice. As mentioned in the research findings, the Consortium for Disability Organizations is an umbrella organization that has the potential to act as a coalition for advocacy however; up to this point it has not undertaken that role to a large extent. The UWTT could join the Consortium for Disability Organizations with the goal of providing more coalition leadership and advocacy strategy with regards to improving special education. Conversely, the UWTT could start its own coalition perhaps using a cross-sector approach to advocate for improved special education. A coalition could undertake a public awareness campaign and or advocate at the policy level.

##### *Benefits of Option 4*

- Coalitions are an effective means of bolster support for an advocacy campaign
- Shared leadership and resources of many organizations means there is less risk and responsibility on an individual organization
- The Consortium of Disability Organizations is an existing asset which could be strengthened and advocacy for improved special education focused upon
- Shared expertise can improve advocacy effectiveness and efficiency

##### *Limitations of Option 4*

- At present, there is some division among nonprofits in Trinidad and Tobago and these organizations would have to work together to advocate for improved special education
- Processes and activities are more complex when by in and collaboration is required within and across sectors

##### *Implications of Option 4*

- Requires leadership and cooperation among organizations with a variety of mandates, visions, goals and values
- Requires appropriate staff, leadership, expertise and skill within the UWTT
- Advocacy through a coalition requires a shared vision which often means compromise

##### *Consequences of Option 4*

- A coalition with a strong voice can be seen as confrontation or adversarial by opposition
- Evaluation and assessment of coalition activities and outcomes are vital to demonstrate effectiveness and efficiency of resources, time and effort

## 7.5 RECOMMENDATION

In consultation with the UWTT, Option 1, the development of a public awareness campaign, was selected as the most appropriate advocacy strategy for improving special education in Trinidad and Tobago, aligning with the resources and capacity of the UWTT. It was further agreed that the development of a public awareness campaign would be strengthened and more successful if combined with Option 4, collaborating with a coalition or partners with similar missions and mandates. It was decided that utilizing the UWTT collective impact pilot project as a model, sharing the success of the project as a means of improving special education in a specific community, would be the most effective and non-confrontational foundation on which to build a public awareness campaign. In this way the UWTT can share its successes, and achievements as well as present viable strategies to address special needs education as well as other interventions implemented to reduce high school drop out rates. The campaign would include posts on social media, a short video as well as a public service announcement on local television. Cross-sector collaboration is essential to the collective impact project and as such collective engagement would be encouraged in the development of the campaign as well as creating exposure and visibility.

## 7.6 NEXT STEPS

The following implementation plan has been adopted from Buckley (n.d.) and outlines the steps for the development of an advocacy implementation strategy for the UWTT. The procedures outlined are based on principles of strategic planning and project management combined with political analysis (Buckley, n.d.).

Assuming that preliminary steps and analysis of the policy environment have been completed through the analysis presented in this report, the community needs assessment conducted by the UWTT and through the collective impact pilot project itself, the UWTT would be developing the public awareness campaign beginning at step three.

### *1. Preliminary Steps*

- Identifying the problems and the policy issues
- Defining the advocacy goal
- Consulting and building relationships
- Establishing credibility as an advocate

### *2. Analysing the Policy Environment*

- Identifying relevant policies, laws and regulations
- Mapping relations of power and decision making
- Considering the options for policy change

### *3. Developing the strategy*

#### **Focusing on the Goal and Objectives**

The goal and objectives of the public awareness strategy would be to present the interventions implemented, accomplishments and lessons learned from the UWTT collective impact pilot project in addressing not on special education but reducing high school drop out rates in a specific community. The goal of the public awareness campaign would be to educate stakeholders as well as the general public in interventions and viable alternatives that better meet the needs of marginalized students.

#### **Identifying the Target Audiences**

The target audience for the public awareness campaign would include education stakeholders as well as the general public. As stakeholders and society learn of the pilot project they will be educated on the issues facing marginalized and special needs students. Public education is essential to move the special education agenda forward, because without stakeholder and societal understanding and responsiveness, the push for system-wide improvements for marginalized students will lack support and urgency.

#### **Identifying Allies and Opponents**

The UWTT will need to identify allies/partners with which to develop the public awareness campaign. The collective impact pilot project utilizes a cross sector collaborative approach and as such, the UWTT can further engage project partners and/or other organizations with similar missions and mandates in the development and implementation of the public awareness campaign. The campaign will be strengthened if supported by allies and a shared message and voice has a greater impact. The hope is that by creating a public awareness campaign that is focused on sharing the achievements of the UWTT collective impact pilot project, the campaign will avoid being seen as adversarial or criticizing the current education system. The UWTT must maintain its relationships and goodwill with the government, stakeholders, as well as the public and private sector and as such, the campaign message while illuminating a holistic alternative to the current education system will be diplomatic and solution-focused.

#### **Selecting the Advocacy Approach**

A public awareness campaign was the advocacy approach chosen by the UWTT. It is important to note that while this report focuses on advocacy for improving special education, it is but a component of the UWTT collective impact project which has implemented a variety of interventions to address high school dropout rates. As outlined in the literature review there are interconnecting forms of exclusion and discrimination faced by marginalized populations, which

require the development and implementation of holistic solutions (Waitoller & Artiles, 2013). As such, the actual public awareness campaign could advocate for more than improved special education as a means of reducing high school dropout rates. It may make sense to include, within the campaign, advocacy for other social justice issues facing marginalized students targeting the relevant government agencies and public sector organizations.

### **Identifying the Key Messages**

The key messages of the campaign specific to improving special education in Trinidad and Tobago should include but are not limited to:

- Lack of special education support is a contributing factor to students exiting school early.
- Presently there are insufficient supports for students with special needs and learning difficulties.
- Inclusion and support of students with special needs and learning difficulties in school and within society is a social justice issue.
- All students should have the right to a quality education regardless of their ability.
- Society and the country of Trinidad and Tobago will benefit from meeting the needs of all students.
- Presentation of interventions, results and outcomes of the UWTT collective impact pilot project that addressed special education.

Upon completing the development of the advocacy strategy, the UWTT would move to step four and step five outlined below.

#### *4. Framing the Plan*

- Preparing a plan of action
- Budgeting and identifying resources
- Risk assessment

#### *5. Implementation*

- Getting the message across
- Using the media
- Building partnerships and coalitions
- Employing tactics and negotiation
- Monitoring and evaluation



## 8.0 CONCLUSION

The undertaking of the UWTT collective impact pilot project to reduce high school dropouts is in itself a form of advocacy. The cross-sector collaboration utilized in the pilot project to implement interventions within a specific community build the capacity of marginalized students while decreasing fragmentation between special education stakeholders. Furthermore, the pilot project is a form of community-based research, whereby interventions are tested and analyzed producing data and findings, which can guide the implementation and improvement of services and supports for marginalized students. Findings from the pilot project can be presented to government agencies and similar projects initiated based on a viable model. Sharing the achievements of the pilot project is a non-adversarial form of public awareness. A public awareness campaign built on presenting the UWTT collective impact pilot project can bring attention to the issues facing marginalized students, empower students to self-advocate, build acceptance and encourage inclusion of students with special needs in the education system in Trinidad and Tobago and within the broader society.

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## APPENDICES

APPENDIX 1 – UWTT COLLECTIVE IMPACT PROJECT DRAFT

**Project Brief**

**Draft 4**

**Fifth Company Community Impact Project**

United Way Trinidad and Tobago

29 May 2016

## Background

United Way Trinidad and Tobago (UWTT) initiated the design of their inaugural Community Impact (CI) Programme in 2012, with funding support from JB Fernandes Memorial Trust. The Initiative was created out of the growing awareness that in order to further develop the model of giving in Trinidad and Tobago, we needed to be able to demonstrate real and sustainable change for the money being spent. This would require a more focused and cohesive approach to addressing growing social needs and will develop a model of collective working for our partners, both Funding and Implementing NGOs. The overall intention is to pilot the model and then make this model widely available to Government and Civil Society so that it can continue to be improved and reproduced throughout the country. Refer Annex 1 for further details on the UWTT Community Impact Strategy development.

## Introduction

The CI Project will be implemented in Fifth Company Village, Moruga. Fifth Company, located in the Princess Town Regional Corporation, is one of the poorest communities in Trinidad and Tobago, despite the fact that Moruga is close to Trinidad's oil reserves. It has a population of 1,454 with 390 households and 382 children below the age of 15. The ethnicity of the area is predominantly Afro-Trinidadian as Fifth Company was one of the settlements of Afro-American soldiers who had to flee when the British lost the American War of 1812. It has a strong cultural tradition of stick fighting.

There are 4 schools in the immediate area, one pre-school, 2 primary and 1 secondary schools. Despite the presence of a secondary school in the area, most of the children attend secondary school outside Fifth Company. About 44% of the population have primary school as their highest level of education.

## Objectives of the Project

The Vision or long term Goal of the Project is to decrease school drop outs in Fifth Company. The Purpose, or end of Project objective, is to ensure children are ready for school and student success in primary schools in Fifth Company. It is envisioned by achieving these objectives that the number of children from Fifth Company attending and graduating from secondary school will increase over time, thereby improving their capacity for better parenting, to secure better incomes and possibly break the cycle of poverty in Fifth Company. This assumes that people stay in Fifth Company after graduating.

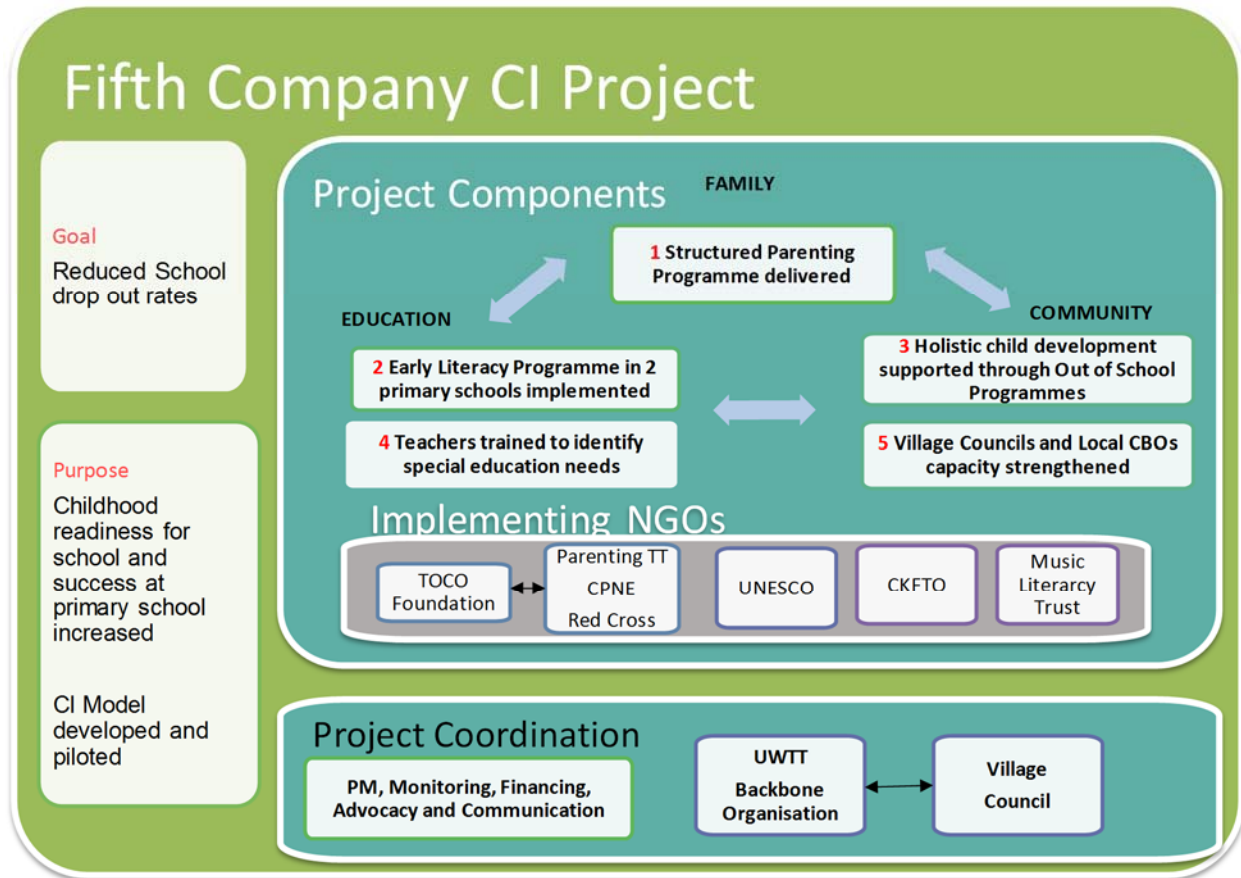
## PROJECT OBJECTIVES

The key objectives or outputs of the Project include:

1. ***A structured parenting programme implemented***, to encourage good parenting practices
2. ***Early literacy promoted*** through providing leadership and literacy training to the principals, infancy year teachers and parents of the pre-school and the primary schools
3. ***Out of school programmes supported*** to encourage holistic child development
4. ***Capacity to identify special and diverse learning needs*** increased by training teachers, parents and parenting agents
5. ***Fifth Company Village Council and local CBOs capacity strengthened*** to ensure they are involved in all aspects of project implementation

Figure 1 illustrates the collective working model of the Project. The Project Framework is attached at Annex 2. The Logic Model of results is attached in Annex 3.

**Figure 1: Collective Working Model of Fifth Company CI Project**



**Project Timing and Phases**

The Project will be implemented in three phases.

1. Design Phase – May 2012 to April 2015,
2. Implementation Phase 1 – May 2015 to December 2017
3. Implementation Phase 2 – January 2018 to December 2020

A key milestone is the development of the Collective Impact model by the end of Phase 1.

Key lessons learnt from Phase I will be used to guide the revision of activities for Phase 2. Phase 1 focuses on the establishment of project management arrangements including the role of the Village Council, building of trust and interest in the Project by the local community and final selection of the implementing NGOs for the various components. In the interest of sustainability, the Village Council and Local CBGs will take more of a lead role in implementation of activities of the Project components and overall project coordination by Phase 2.

Figure 2 summarises the key elements of each phase.

**Figure 2: CI Project Phased Design and Implementation**



### **Project Management Arrangements**

UWTT, as the backbone organisation, will provide overall project management support to ensure that components are implemented cohesively and in a timely manner to optimise the synergistic effect of all component activities for the benefit of the community. Consistent with how UWTT operates, this project combines financial and other technical resources from multiple funding partners to support implementation by NGOs and Community Based Organisations (CBOs).

In support of the project management role, UWTT has appointed a dedicated Project Coordinator (PC), who reports to the Chief Executive Officer (CEO), and has established a project office in Fifth Company which will be shared by all Implementing Partners including the Village Council. The PC is supported by UWTT Core teams<sup>1</sup> and UWTT will provide support to all partners in monitoring and evaluation, financing, advocacy, communication and capacity building of local CBOs. The Project Monitoring and Evaluation Plan will provide the results framework of the Project and how data will be collected and analysed over the duration of the Project. Achievement of key milestones for Phase I and extraction of lessons learnt will feed into the detailed design and budgeting of Phase II.

Essential to the sustainability and achievement of community development, the Fifth Company Village Council (VC) will be a key partner in project coordination with UWTT.

### **Project Governance**

UWTT has convened a Community Impact Advisory Committee (CIAC) as a standing committee of the Board of Directors to provide oversight over the Fifth Company CI Project in terms of financial accountability and good governance. Further, as the organisation’s pilot project in CI, the CIAC will advise the Board and Funding Partners on lessons learnt for UWTT on advancing community impact as a strategy for improving the capacity of UWTT, and other funders, to measure performance and demonstrate better social return on investment or value for money.

UWTT will ensure that the role of the VC in the overall governance of the Project increases as their capacity is increased. It is intended that by the end of Phase I, the VC will have appointed a Project Steering Committee, which will be supported by the PC, and they will have an enhanced role in Phase II.

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<sup>1</sup> Resource Development and Marketing Team and Community Investment and Operations Team

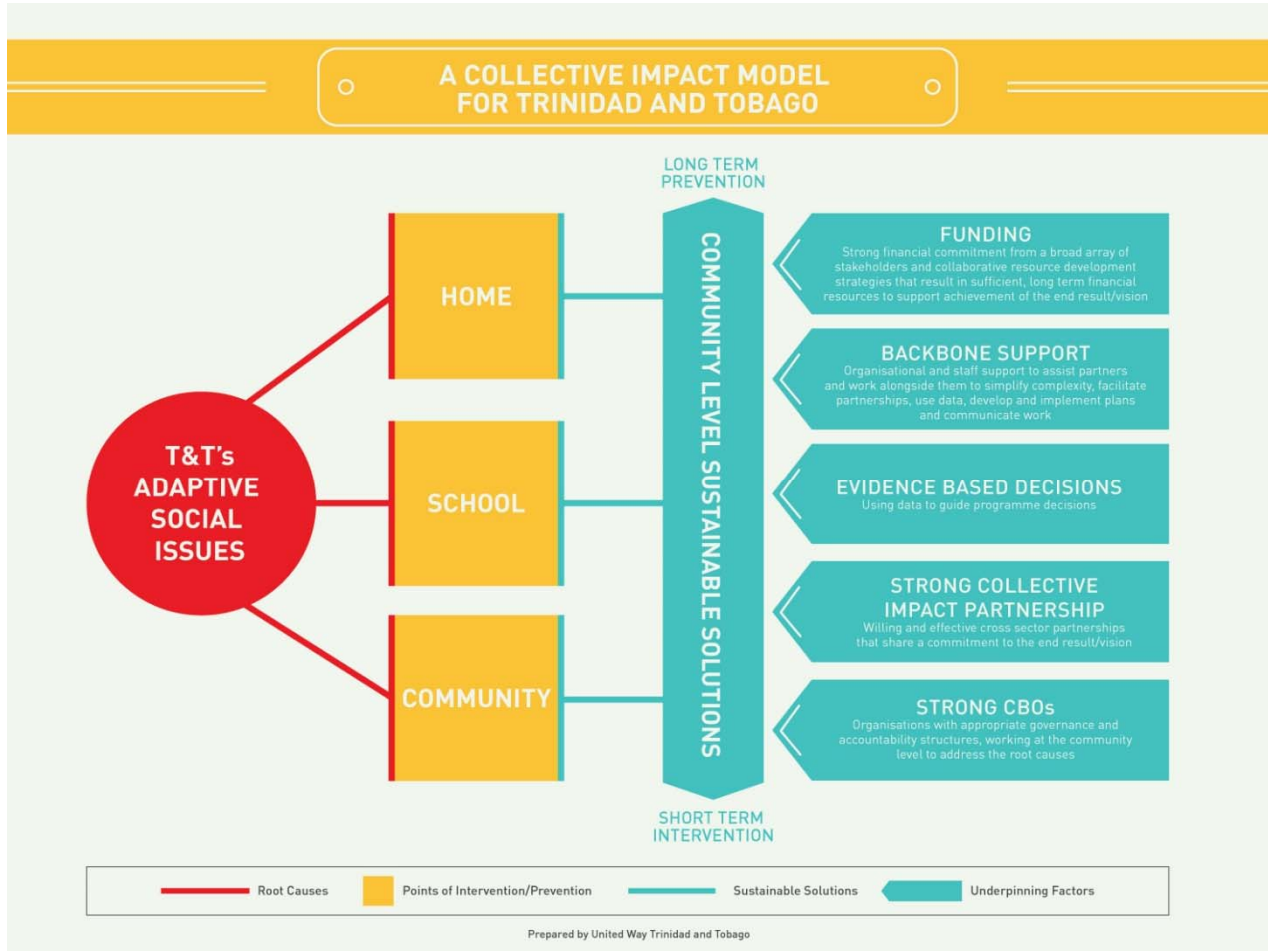
A Technical Advisory Panel was appointed during the design phase to oversee specific aspects of project design, development of terms of reference, selection of NGO Partners for the components and negotiation of contracts. It is intended that this role will be elaborated as part of the overall monitoring of the project through implementation.

### **Project Budget**

The Project Budget is currently estimated at TT\$7.86M over the period 2015-2020, with Phase 1 budget \$4.65 and Phase 2 budget at \$3.21m. Phase 2 objectives and budget will be revised at the end of Phase 1 based on the lessons learnt from Phase 1 and on funds pledged by September 2017. An indicative 2015-2020 budget is attached in Annex 4, based on Phase II being implemented with greater inputs and leadership by the VC and a focus on implementation by local CBOs.

## Annex 1: UWTT Community Impact Strategy

An underlying philosophy of the United Way Community Impact Model is to address root causes of the selected social issue and invest in strategies for lasting community change and partnerships to define and implement those strategies.



**Figure 1: A Collective Impact Model for Trinidad and Tobago**

Research revealed that the four (4) most deep-seated causes of students' early exit from school and poor academic performance in the Fifth Company community are found in the child's home, school and community environments, as depicted in **Figure 1**. These four (4) deep-seated causes were identified as:

1. poor parenting,
2. illiteracy, sometimes caused by an undetected disability,
3. no additional academic assistance for struggling students and
4. poverty.

It stood to reason that if the root causes were found in the home, school and community environments, the strategy to tackle these root causes must be applied in these environments to be effective. In addition, the strategy must be applied through community level interventions by strong NGOs and CBOs and be

underpinned by evidence based decisions, adequate funding and cross sector partnerships, as depicted in **Figure 1**.

UWTT, acting as a convener, invited a number of partners to participate in the development of a strategy to address School Dropouts and Poor Academic Performance, and invest in the implementation of the strategy.

A draft strategy was developed in September 2014 and consultations were held with the following key stakeholders:

- a. Fifth Company Village Council
- b. Principal of the Fifth Company Private Preschool
- c. Principal of the Fifth Company Baptist Primary School
- d. Principal of the Fifth Company AC Primary School
- e. Principal of the Cowen Hamilton Secondary School
- f. Principal of the Moruga Secondary School
- g. Dean of the Princes Town West Secondary School
- h. CIAC
- i. UWTT Staff
- j. Scotia Bank Foundation officials
- k. Republic Bank Limited officials
- l. Education and Social Experts (Margaret Sampson Browne, Kathy Bharrathsingh, Zena Ramatali and Hamida Baksh)
- m. a number of NGOs in and outside of the UWTT network
- n. officials at the University of the West Indies Family Development and Children's Research Centre
- o. Education and child development experts (Dr Jane Bernstein and Allyson Hamel Smith)
- p. Counterparts at United Way Greater Atlanta and
- q. Counterparts at United Way Worldwide

In March 2015, the Fifth Company CI Project, an action research project which addresses the four (4) deep-seated root causes of early school exit and poor academic performance, was approved for implementation, over the period 2015 to 2020 in 2 Phases, by the Board of UWTT.

It is envisaged that the Project will create lasting community changes in Fifth Company and will culminate in a Model which can be replicated or scaled up for other communities in Trinidad and Tobago.

## Annex 2: Fifth Company CI Project Framework

Narrative	OVis (Indicators)	Means of Verification	Assumptions
<b>Goal</b> To reduce school dropouts in Fifth Company	% of Fifth Company population with primary school as highest level of education decreasing	Survey of Living Conditions	
<b>Purpose</b> <b>Children enter school ready and success at primary school improved</b> <b>A Childhood Success Community Impact Model developed</b>	# Families supporting their children's success in schools # children that meet key development milestones (age 0-5) Improved capacity for self regulation improved primary school performance Collective Working Model Toolkit developed and disseminated to funders by Jan 2018 Childhood Success Model Toolkit developed and disseminated by Nov 2020	Primary Schools (national tests results, SEA results)  Project Progress Report  Toolkits  UWTT Annual Reports	Government improves efforts for Early Childhood Education and Special Education
<b>OUTPUTS/COMPONENTS</b>			
1. Structured Parenting Programme developed and implemented	Improved school attendance (reduction in absenteeism) Family Interactions Preschool registration Change in Household income generation % of parents with PA support functionally literate	Teacher interviews  Preschool attendance and punctuality records  Assessment notes	<b>Funding available for Phase I implementation before project starts</b>  Funding available for Phase II implementation by September 2017
2. Early literacy and leadership training provided to the primary schools	Use of library services (# of books borrowed) Reading and writing abilities in infant students Children age 9 at required literacy level	Infants One and Two Teacher interviews  Term/Weekly Test results  Principal (# of times reported);	<b>NGOs capable and willing to work in Fifth Company</b>
3. Holistic child development supported through out of school programmes	% Children participating in out of school time activities  % Children receiving homework help or remedial support	Parents Interviews	<b>Village Council and other CBOs will be open to change</b>
4. Teachers and parents training provided on identifying children with different learning styles	School's capacity to detect developmental gaps early  Improved behaviour and academic results in students identified with developmental gaps		
5. Fifth Company Village	VC Planning Committee meeting		

Narrative	OVI (Indicators)	Means of Verification	Assumptions
Council and local CBOs capacity strengthened	regularly with local CBOs		
<b>ACTIVITIES</b>			
1.1. Recruit and train Parenting Agents (PAs) 1.2. Implement In home Parenting Support Programme for selected families 1.3. Develop Community based support for families 1.4. Identify and support families to access locally available and affordable social services	# PAs trained  Ratio of PA to families  # Families enrolled in Parenting Programme  # children age 0-12  # Families referred to social services	Teacher attendance & punctuality records  Parenting agents; Parents; Children Interviews  Teacher Interview  Parents Interviews	Willingness of families to participate and commit to parenting programme and other referred programmes   Able to retain trained PAs for duration of project
2.1. Support Primary Schools to implement Leading for Literacy Programme. 2.2. Support the school PTA to develop and maintain school library resources with a focus on learning to read 2.3. Provide complementary adult literacy training and support to parents of infants 1 and infants 2	# teachers completed Programme to UNESCO standards  # principals completed Programme to UNESCO standards  # parents completed Common Sense Parenting programme  # parents with PA support enrolled in Adult literacy programme	School Library; Princes Town NALIS  Teacher Interviews, School assignments	Ministry/School and Parents' approval  All trained teachers are not reassigned Out-of-Schools
3.1. Promote the development of partnerships between the school and local CBOs to establish an integrated programme of OST activities for disadvantaged and at risk youth 3.2. Support the implementation of inclusive OST programmes in sport, music and dance for children up to age 9 in the primary schools of Fifth Company 3.3. Establish homework supervision and remedial tutoring for Standard 4 and 5 students preparing for the Secondary Entrance Examination (SEA) 3.4. Support the establishment of a peer learning OST Programme led by the Young Leaders programme	# OST programmes operational  # students enrolled in at least one non academic OST programmes  % of children of families supported by PAs in at least one OST programme  # students identified with different learning styles enrolled in OST programme  # CH Young Leaders active in mentoring programme	Teacher Interviews, School assignments  Report Books; teacher  Teacher; parents  Project Reports	Funding available for the out of school programme  Parents will ensure consistent attendance of children

Narrative	OVIs (Indicators)	Means of Verification	Assumptions
at Cowen Hamilton			
<p>4.1 Build capacity of teachers through training and in class observation for identifying and managing children with different learning styles</p> <p>4.2 Increase awareness of parents and parenting agents on identifying children with different learning styles and ways to support them at home</p> <p>4.3 Provide therapeutic camps for selected children to improve their capacity for self regulation</p> <p>4.4 Ensure that children who require specialist services are referred to the Guidance Counsellor and are included in appropriate out of school programmes</p>	<p># teachers completed Level I successfully by classroom observation</p> <p># teachers completed Level II successfully by classroom observation</p> <p># parents (and PAs) completed Level I</p> <p># parents (and PAs) completed Level II</p> <p># children completed therapeutic camps</p> <p># children referred to Guidance Counsellor</p>	<p>Principals; Teachers Interviews</p> <p>Teacher; Parents Interviews; Service provider reports</p>	<p>Access to MoE and MoH programmes for children identified with learning disabilities improved for Fifth Company</p>
<p>5.1 Engage with the Village Council and local leaders e.g. school principals to build relevance of project activities and local ownership</p> <p>5.2 Develop and implement a capacity building programme for the Village Council for planning, coordination, communication and monitoring progress of the Project</p> <p>5.3 Support the establishment and strengthening of existing local community based groups (CBGs) to ensure knowledge transfer occurs from implementing NGOs and to build local capacity for services delivery</p>	<p>VC meeting quarterly</p> <p>Fifth Company Development Plan 2020 completed and aligned to Local Economic Development Plan</p> <p># CBOs active</p>	<p>Village Council interviews</p> <p>Fifth Company Development Plan</p> <p>UWTT assessment report</p>	<p>Village Council and other CBOs will be open to change</p>

Narrative	OVIs (Indicators)	Means of Verification	Assumptions
<p><b>Project Management Activities</b></p> <ol style="list-style-type: none"> <li>1. Mobilise resources</li> <li>2. Contract Implementing NGOs</li> <li>3. Establish communication in community to gain continued buy in and between implementing NGOs and with community</li> <li>4. Convene additional partners in private and public sectors</li> <li>5. Strengthen capacity of backbone organisation for core functions</li> <li>6. Develop and implement joint workplan to ensure mutually reinforcing activities among NGOs and Backbone org</li> </ol>	<p><b>Inputs</b></p> <ol style="list-style-type: none"> <li>1. Funding for Phase I to Dec 2017: 3 yrs – TT\$4.64M</li> <li>2. Funding for Phase II Jan 2018 to Dec 2020: TT\$3.2M</li> <li>3. Implementing NGOs contracted and operational</li> <li>4. Village Council and local CBOs</li> <li>5. M&amp;E and project management Human Resources in UWTT</li> </ol>		

### Annex 3: Fifth Company CI Project illustrative Logic Model of results





**Annex 4: Indicative Budget as for Fifth Company CI Project based on 5 year Implementation Framework**

		Implementation Phase I (Pilot Phase)			Implementation Phase II (note 1)			SUBTOTAL	%
		5/15-4/16	5/16-12/16	1/17-12/17	1/18 - 12/18	2019	2020		
Components		2015 (note 2)	2016 (note 3)	2017 (note 3)	2018	2019	2020		
1	Structured Parenting Programme developed and implemented (refer note 4)	1,495,632	360,000	800,000	400,000	300,000	200,000	3,555,632	45%
2	Early literacy and leadership training provided to the primary schools	UNESCO/RBL Literacy Now! Programme			UWTT NDOC			-	0%
3	Holistic child development supported through out of school programmes		200,000	300,000	250,000	200,000	200,000	1,150,000	15%
4	Teachers and parents training provided on identifying children with special education needs		150,000	150,000	150,000	150,000	150,000	750,000	10%
5	Fifth Company Village Council and local CBGs capacity strengthened	93,090	100,000	150,000	150,000	150,000	150,000	793,090	10%
	<b>SUBTOTAL</b>	<b>1,588,722</b>	<b>810,000</b>	<b>1,400,000</b>	<b>952,018</b>	<b>802,019</b>	<b>702,020</b>	<b>6,254,779</b>	<b>80%</b>
	Project Coordination: M&E, Financing, Capacity Building, Advocacy and Communication	270,000	180,000	400,000	250,000	200,000	300,000	1,600,000	20%
	<b>TOTAL</b>	<b>1,858,722</b>	<b>990,000</b>	<b>1,800,000</b>	<b>1,202,018</b>	<b>1,002,019</b>	<b>1,002,020</b>	<b>7,854,779</b>	
	% by year	24%	13%	23%	15%	13%	13%		
	% Project Coordination	15%	18%	22%	21%	20%	30%		
		Phase I (Pilot Total)			<b>4,648,722</b>	Phase II Total		<b>3,206,057</b>	

