

**TWENTY YEARS AND COUNTING:
AN EXAMINATION OF THE DEVELOPMENT OF
EQUITY AND INCLUSIVE EDUCATION POLICY IN ONTARIO (1990–2010)**

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In response to the oft-cited inadequacies of the policies and pedagogies of multicultural education, the Ontario Ministry of Education mandated that school boards develop equity and inclusive education policies, as specified in Policy/Program Memorandum No. 119 [2009 version]: “Developing and Implementing Equity and Inclusive Education Policies in Ontario Schools.” Relying on document analysis and policy analysis as methods of data collection, this study examined the ideological, socio-cultural, political, legal, and economic context from which PPM No. 119 [2009] developed in order to understand what groups of stakeholders were included in the policy development and whose values the policy document ultimately represents. Collected documents that represent both the federal and provincial level of policy making and a variety of regional stakeholders and policy actors illustrated that, despite a shift to focus on equity, conceptions of liberal multiculturalism continue to influence education policy in Ontario. This study concluded that the process of equity education policy development must be made a more inclusive process, reflecting the identities, values, and experiences of school administrators, teachers, and students.

Introduction

Two major tensions seem to exist within a complex process of education policy development in Ontario. First, education is formally a provincial responsibility, and yet federal legislation, especially in the area of multiculturalism and citizenship, has shaped the types of options available to policymakers at the provincial and territorial level (Joshee, 2004). Responses to the federal policy on multiculturalism at the provincial level ranged from enthusiasm to slow

and uneven implementation, cautious adaptation, inaction, and even outright rejection (Egbo, 2009; Ghosh & Abdi, 2004). Second, significant tension exists between the Ontario Ministry of Education and regional district school boards. The formal task of developing education policy falls under the jurisdiction of the provincial authorities; implementing these policies and the more complex task of drafting locally developed policies are the responsibility of school districts. Needless to say, policy implementation is consequently anything but seamless, as the relationship between provincial or territorial ministries and school districts is as often characterized by tension as it is by harmony (Joshee, 2004). The complexity of the education policy terrain in Ontario has led to the development of few policies in the area of equity and inclusion, whereas developed policies have had only minor impacts on educational practices in Ontario schools (Chan, 2007). Equity and anti-racism policies continue to suffer setbacks because the school system has not found a systemic way to enforce anti-racism and equity policies (Agyepong, 2010). Even more so, a noticeable retrenchment with respect to equity policies is taking place at the Ontario Ministry of Education, as issues related to equity have been subsumed under the banner of school safety, discipline, harassment, and bullying.

Despite attempts at more equitable and inclusive models of multicultural education in Ontario, schools remain dominant sites for the perpetuation of race, gender, sex, and class-based inequalities (Barakett & Naseem, 2009). Some groups of marginalized students based on race, class, gender, religion, sexual identity, and physical and mental ability continue to be at risk for lower levels of educational opportunity and achievement, and increased drop-out rates and crime participation (Ghosh & Abdi, 2004; Harper, 1997; James, 2007; Ontario Ministry of Education, 2009d). In response to these inadequacies, the Ontario Ministry of Education mandated that school boards develop equity and inclusive education policies, as specified in Policy/Program

Memorandum No. 119: “Developing and Implementing Equity and Inclusive Education Policies in Ontario Schools” (Ontario Ministry of Education, 2009c: henceforth PPM No. 119 [2009], with the date in square brackets, as distinguished from PPM No. 119 [1993]). Despite a policy aimed at remedying this situation, a considerable and observable gap exists between the goals of policy and the realities of practice in many Ontario schools (Dei, 2003; Ghosh, 2002). One way to understand the underlying reasons for this gap is to examine the development of policy.

Throughout this paper, we attempt to shed light on the contextual landscape within which policy processes are situated. Pioneer in the field of policy studies Harold Laswell urged researchers to connect technical analysis of policy to the social and political context from which they develop. Heeding this advice, our study aimed to “provide a rich, though complex, picture of the myriad factors that shape public policy” (Howlett, Ramesh, & Perl, 2009, p. 50). Our purpose was to understand what groups of stakeholders were included in the development of PPM No. 119 [2009] and whose values the policy ultimately represents. The contextual portrait that we paint below includes five different dimensions—ideological, socio-cultural, political, legal, and economic—as well as three critical factors shaping these dimensions—institutions, ideas, and actors. Operating within the notion of *policy subsystem* (Howlett et al., 2009), we hope to highlight the role that both individual and organized actors play in the development of policy, while simultaneously recognizing that the actions of stakeholders are tempered by the political, economic, and social structures that surround them. Upon reviewing the theoretical frameworks of *force-field analysis* and the *policy making cycle* instrumental for this study, we describe the methodological underpinnings of our research providing a justification for our reliance on document analysis and policy analysis as methods of data collection. Finally we share the contextual findings from document and policy analyses, and connect these findings to the themes

and theoretical frameworks presented in the literature. We conclude with implications for policy and avenues for further research.

Theoretical Frameworks

Two theoretical frameworks were used to inform this study. First, Lewin's (1947) *force-field analysis* was used to understand the forces that were most significant in the development of PPM No. 119 [2009]. According to Lewin, social issues or situations are held in balance by the interaction of two opposing sets of forces—those seeking to promote change (driving forces) and those attempting to maintain the status quo (restraining forces). Although frequently used as a framework of analysis in social psychology and group dynamics, force-field analysis can serve as a useful theoretical tool in the field of policy studies (Ellis, Reid, & Scheider, 1995; Lan & Lee, 1997). In the policy process, forces such as idea sets, stakeholders, and institutional arrangements can be represented as driving forces in the development of specific policies, or restraining forces in the maintenance of the status quo. This force-field analysis framework was used to assess the relative strength of various stakeholder groups and policy actors, their ideas, as well as the political and economic institutions within which they operate, in order to identify the ideological, socio-cultural, political, legal, and economic forces that were most critical in the development of PPM No. 119 [2009].

The *policy making cycle* (Howlett et al., 2009) provided a framework for understanding the policy making process and the different stages involved in the development of PPM No. 119 [2009]. The first stage, *agenda-setting* involves the recognition of some subject as a problem requiring further government attention. Second, *policy formulation* involves proposing possible solutions to a given problem that has been acknowledged by government and placed on the

formal agenda. Third, *policy decision-making* occurs when one or more, or none, of the many options that have been debated and examined during the previous two stages of the policy cycle are approved as an official course of action. The decision-making stage formalizes who is included and who is excluded and determines whether a policy will alter or maintain the status-quo once implemented. Due to the nature of this research study, the final stages of the policy making cycle, *policy implementation* and *policy evaluation*, were situated outside the primary scope of our inquiry, that of policy development.

Methodology

Broad ideological, socio-cultural, political, legal, and economic changes most often have significant impact at the government level, as wide macro-level system changes often require that documents and policies change accordingly (Kutsyuruba, 2008). Therefore, this research study relied on document analysis as a qualitative research method of data collection and analysis. Although often neglected in methodological research, document analysis is increasingly recognized as a promising and innovative strategy for collecting and assessing data (Berg, 2000; Hodder, 2000). Document analysis is a systematic procedure for reviewing and evaluating documents, both in printed or electronic formats, which entails finding, selecting, appraising, and synthesizing data contained in the documents (Bowen, 2009). Documents are not simply content containers; they are social products of collective, organized action (Prior, 2003), and are produced in and reflect specific social and historical circumstances (Miller & Alvarado, 2005). The social nature of the production, exchange, and consumption of documents means that they offer "social facts" rather than transparent or consistent representations of social reality (Atkinson & Coffey, 1997)

Although this research considered many different types and sources of records, it prevalently dealt with official documentary records (Berg, 2001). Official policy documents as both the means of *external communication* and the *informal* responses to formal policies by various stakeholders (McMillan & Schumacher, 2010) were analyzed in a complementary fashion in this study. In the context of this study, the purpose of policy analysis was “to know, to understand, and to describe policy making . . . [gaining] knowledge of how the system works” (Downey, 1988, p. 41). For a more nuanced examination of education policy documents, we applied Pal’s (1987) framework consisting of three approaches to policy analysis: *descriptive* (including content analysis and historical analysis); *process*; and *evaluation* (including logical, empirical, and ethical evaluations). The synergy of some of these types of policy analysis provided a multi-perspective analytical model for this research. In addition, we used a framework for analyzing documents consisting of content and context analytic approaches: (a) the analysis of documents for their content (content analytic); (b) the analysis of documents as commentary (context analytic); and (c) the analysis of documents as actors (context analytic) (Miller & Alvarado, 2005). Of particular significance for this research was the latter approach in terms of uncovering the production, exchange, operation, or action of policy documents (Miller, 1997; Prior, 2003).

Data Collection

The process of data collection was ongoing between September 2010 and January 2011. In total, over 100 documents were collected. Approximately 69 of these documents were examined as part of the analysis.

Federal government publications and other documents from national organizations were collected to understand the broad context within which equity and inclusive education policy developed in Ontario. Legislative documents collected from the federal government included the Constitution Act, 1867, the Canadian Charter of Rights and Freedoms, and the Canadian Multiculturalism Act, 1988. Publications were collected from other federal government departments including Citizenship and Immigration Canada, the Department of Canadian Heritage, Statistics Canada, and the Council of Ministers of Education, Canada.

To construct an understanding of the political processes that led to the development of PPM No. 119 [2009], documents were collected from the Ontario provincial government, including the Legislative Assembly of Ontario records, the Royal Commission on Learning, and the Ontario Human Rights Commission. Pertinent legislation in Ontario was also collected, including the Education Act and the Ontario Human Rights Code. Focusing on the ideological and political context, we searched for the equity and inclusive education policies and supporting documents, a variety of policy directives, and numerous publications related to the safe schools initiative, positive school climate, and discipline. Four memoranda issued by senior administrators at the Ministry of Education throughout the process of policy development were collected.

Finally, documents were collected from a variety of stakeholders, interest groups, and policy actors at the national, provincial, and regional levels. A variety of documents, were collected from professional education associations including the Ontario College of Teachers (OCT) and the Ontario Teachers' Federation (OTF). Position statements were collected from education advocacy groups including the Antiracist Multicultural Education Network of Ontario (AMENO), People for Education, and Egale Canada.

Data Analysis

Based on the variety of methodological sources on content analysis of documents (Krippendorff, 1980; Lombard, Snyder-Duch, & Bracken, 2010; Mayring, 2000; Merriam, 1998; Neuendorf, 2002; Salminen, Kauppinen, & Lehtovaara, 1997), a rigorous set of steps was developed for conducting analysis. Considering the methodological advantages and limitations of document analysis (Bowen, 2009; Caulley, 1983), data analysis was determined by both the research objectives (deductive) and multiple readings and interpretations of the data from the documents (inductive). When analyzing collected documents, this study blended the analysis of *manifest content*, “those elements that are physically present,” and *latent content*, “an interpretive reading of the symbolism underlying the physical data” (Berg, 2001, p. 242). Policy documents, including PPM No. 119 [2009], are often produced to be intentionally vague. Their interpretation rests ultimately in the hands of local authorities. Both types of content analysis were used to uncover the intended purpose of the documents as stated by the authorities that created them, as well as the different interpretations of the documents made by local authorities.

The phases of content analysis of documents included domain definition, category construction, sampling, data collection, data analysis, and interpretation (Merriam, 1998). Furthermore, the process of domain definition consisted of such steps as describing a set of candidate documents for analysis, partitioning the candidate documents into subdomains, and selecting the subdomains for further analysis (Salminen et al., 1997). Furthermore, this study used three units of analysis: *theme* (a string of words or simple sentences); *characters* (person or group of people who were significant to the analysis); and *concepts* (words that have been grouped together to form ideas). The three units of analysis—theme, character, and concept—aided in the identification of relevant ideas, actors, and institutions that shaped the development

of PPM No. 119 [2009]. In addition, we followed guidelines for assessing and reporting intercoder reliability in content analysis studies (Lombard, Snyder-Duch, & Bracken, 2010).

Contextual Analysis of the Research Findings

The overall goal during the process of data analysis was to gain understanding of the different ways in which the ideological, socio-cultural, political, legal, and economic contextual forces related to and shaped one another. Examining the connections between the five contextual forces and the ideas, actors, and institutions that shape these forces provided a deeper understanding of the primary stakeholders in the development of PPM No. 119 [2009] and the ideas they hold regarding equity and inclusive education. This section explores the various contexts from which equity and inclusive education policy emerged in Ontario.

Ideological Context

Ideas play an important role in shaping the policy cycle, often ranging from the most particular and self-interested points of view to widely held belief systems that endure through the ages (Howlett et al., 2009). The ideas that certain policy actors hold and pursue as well as the ideas embedded in past public policies influence the development of policy and are explored as part of the ideological context from which equity and inclusive education policy developed in Ontario. Policy discourse(s) captures the way in which the established beliefs, values, and attitudes of various policy actors help construct policy problems and shape the solutions that are proposed as being acceptable and feasible (Pal, 2006). Prominent discourses were identified from various government documents to illuminate how government ideas, as presented in various documents, can be understood as policy discourses. Some of the prominent discourses shaping

equity education policy in Ontario that are explored below include *multiculturalism*, *safe schools*, and *academic excellence*.

Although it may seem that political ideologies may seem distinct and separate from the philosophies that shape the practice of education in Ontario, it is difficult to refute that “what one believes to be in the best interests of society (or a particular slice of society) shapes one’s beliefs about what should go on in schools” (Barlow & Robertson, 1994, p. 121). With this in mind, we begin with a discussion of the discourse of multiculturalism as an ideology shaping the development of equity education policy in Ontario. First, liberal *multiculturalism* was identified from the literature and the particularities of its meaning and application were extracted from the collected documents that represent the federal level of policy making. In the Canadian context, *multiculturalism*, as a political term, gained even more currency following Trudeau’s announcement of the official multiculturalism policy in 1971. Often conceptualized as a more desirable policy than cultural assimilationist policies, multiculturalism promotes a politics of recognition that acknowledges the identities and rights of cultural and ethnic minority groups. Citizenship and Immigration Canada, the federal department responsible for multiculturalism, expressed the federal government’s position on multiculturalism: “Canadian multiculturalism is fundamental to our belief that all citizens are equal. Multiculturalism ensures that all citizens can keep their identities, can take pride in their ancestry, and have a sense of belonging” (Citizenship and Immigration Canada, 2008). Canadian multiculturalism is also constructed as a vehicle for promoting acceptance of and respect for cultural differences, according to Citizenship and Immigration Canada, “acceptance gives Canadians a feeling of security and self-confidence, making them more open to, and accepting of, diverse cultures. The Canadian experience has

shown that multiculturalism encourages racial and ethnic harmony and cross-cultural understanding” (2008).

Before exploring the discourses of *safe schools* and *academic excellence* and how they influenced the development of equity and inclusive education policy in Ontario, it is helpful to elaborate on the concept of a *policy ensemble*. The concept of the policy ensemble helps us understand how “policies can be clustered together to form new policy ensembles . . . inter-related and mutually reinforcing policy sets” (Ball, Maguire, & Braun, 2012, pp. 5–7). The image of the policy ensemble allows us to conceptualize the role of safe schools policies and Ontario’s commitment to academic excellence in shaping and being shaped by Ontario’s equity strategy.

A second important discourse that emerged in various documents collected from the Ontario Ministry of Education was *safe schools*. The safe schools initiative reflected the ministry’s commitment to “building and sustaining a positive school climate for all students in order to support their education so that all students reach their full potential” (Ontario Ministry of Education, 2009b, 2010). The analysis of the safe schools initiative revealed that the ideas of equity and inclusion had gained currency within the ministry prior to the release of PPM No. 119 [2009]. Safe schools legislation is predominately a development of the past decade, with Ontario introducing legislation in 2000, Manitoba in 2004, and BC in 2007, later revised in 2008. The purpose of safe schools legislation was to prevent bullying, violence, and discrimination, and followed slowly after many ministries and districts across Canada had years of experience in developing and implementing multicultural, anti-racism, and gender equity policies and initiatives. Despite the existence of diversity and equity policies in many ministries and districts across the country, stakeholders continued to push for policies and initiatives that directly

addressed issues of bullying and violence related to diversity. It is not surprising that safe schools policies have become directly linked with policies and initiatives related to diversity and equity.

The Ontario Ministry of Education released *Reach Every Student: Energizing Ontario Education* in the winter of 2008 outlining the three core priorities for public education in Ontario: high levels of student achievement, reduced gaps in student achievement, and increased public confidence in the publicly funded education system (Ontario Ministry of Education, 2008). These three core priorities, echoed throughout the Ontario ministry's equity strategy, express Ontario's strong commitment to *academic excellence*. The three core priorities for education in Ontario are an example of Ontario's strong commitment to academic excellence. Furthermore, these three core priorities are echoed throughout the Ontario ministry's equity strategy and are an example of the clustering of equity education policies with initiatives to improve academic excellence. For example, in a press release from the Ontario Ministry of Education, "Greater Equity Means Greater Student Success," the ministry expressed that "Ontario is taking important steps forward to reduce discrimination and embrace diversity in our schools to improve overall student achievement and reduce achievement gaps" (Ontario Ministry of Education, 2009, April 8). Equity initiatives are being pursued in Ontario's education system as a way to achieve greater academic excellence.

Finally, and perhaps the strongest example of a policy ensemble, three important documents collected from the Ontario Ministry of Education, taken together, make up Ontario's equity strategy. The statement outlined three key documents that formed the foundation of the ministry's equity strategy. The first document, released on April 6, 2009, titled *Realizing the Promise of Diversity: Ontario's Equity and Inclusive Education Strategy* (Ontario Ministry of Education, 2009e), the strategy document, formally expressed the ministry's vision that equity

education policy would be pursued in tandem with the three core priorities for public education.

The second document, released June 24, 2009, is the official policy statement issued from the Ministry of Education, which required that “all publicly funded school boards will review and/or develop, implement, and monitor an equity and inclusive education policy in accordance with the requirements set out in this memorandum and in the strategy” (Ontario Ministry of Education, 2009c, p. 3). PPM No. 119 [2009] mandated that equity and inclusive education policy in

Ontario focus on

respecting diversity, promoting inclusive education, and identifying and eliminating discriminatory biases, systemic barriers, and power dynamics that limit the students’ learning, growth, and contribution to society. These barriers and biases whether overt or subtle, intentional or unintentional, need to be identified and addressed. (p. 2)

Finally, the guidelines document, released in 2009, titled *Equity and inclusive education in Ontario schools: Guidelines for policy development and implementation* (Ontario Ministry of Education, 2009a) provided guidelines and resources for school boards in developing, implementing, and monitoring equity education policies.

Socio-Cultural Context

Technical analysis of policy requires particular attention to the socio-cultural context in order to provide a rich picture of the multitude of factors that contributed to its development. Increased immigration from non-traditional countries of origin, a growing visible minority population, and an increasingly diverse school-age population are demographic factors that are posing new challenges for the Ontario Ministry of Education with respect to equity (Statistics Canada, 2003; 2008). Statistics Canada addressed the challenges associated with accommodating this increasingly diverse school age population and urged that “the addition of immigrant

children into the educational system is an important issue for educators. Concentrations of new immigrant children present challenges to local school boards, as many newcomers come from diverse cultural backgrounds” (2003, p. 9).

An important element in the socio-cultural context from which PPM No. 119 [2009] are the stakeholder groups that shaped the ideological contours of equity and inclusive education policy in Ontario.

First, AMENO is a network of educators, community members, and parents, working together, to “eliminate broad-based and systemic biases, and to replace barriers with acceptance and inclusion for every individual” (AMENO, 2007, p. 2). We highlight two documents collected from AMENO that, taken in combination, illustrate AMENO’s early and continued involvement in the development of equity and inclusive education policy in Ontario. The first document, a position paper, dated June 2007, expressed recommendations for the development of equity and inclusive education policy. AMENO urged a systemic approach to equity, highlighting the necessity of increased funding for school equity personnel, opportunities for professional learning, and the creation of accountability measures. The second document, titled *Achieving Equity in Education Today*, highlighted the role of AMENO’s Equity Summit Group (ESG) in liaising with the Ontario Ministry of Education. The ESG “has been instrumental in providing AMENO with critical and relevant information on the status of equity, human rights and anti-racism in the school system” (Samuel, 2008, p. 2).

Second, as a parent-led charity, People for Education works to support and improve public education in Ontario’s English, French, and Catholic schools. We focus on their report titled *Ontario’s Urban and Suburban Schools* (2008) and the guiding principles that informed this report. The first principle stated that, “curriculum, teaching and pedagogy that are culturally

responsive to Ontario's multiple diversities must be a key component of Ontario's education policy" (People for Education, 2008, p. 1). The second principle stated that "instead of compartmentalizing students as 'at-risk,' Ontario's education system must instead focus on ensuring equitable outcomes for all students" (p. 1). Furthermore, the report argued that "the public education system exists to ensure that every student has an equitable chance for success. But for many students, this is not the reality" (p. 14). Ontario's urban/suburban schools, home to high numbers of students whose socio-economic background puts them at-risk, "continue to struggle to provide the programs, resources, teaching methods, curriculum and supports that would provide equitable outcomes for all students" (p. 15).

Finally, founded in 1986, Egale Canada is "a national organization committed to advancing equality and justice for lesbian, gay, bisexual and trans-identified people, and their families, across Canada" (Egale, 2005). Egale is heavily involved in public education evidenced by *Egale's First National Climate Survey on Homophobia and Transphobia in Canadian Schools*. According to this survey: "three quarters of self-identified lesbian, gay, bisexual, trans, queer, and questioning (LGBTQ) students who participated feel unsafe at school...LGBTQ students are exposed to high levels of homophobic and transphobic bullying" (Egale, 2009). In light of these results, Egale Canada recommended "the implementation of anti-homophobia and anti-transphobia policies as well as school board support for Gay-Straight Alliance (GSA) clubs, which connect LGBTQ students and allies with the aim of creating safe and inclusive school environments" (2009).

The socio-cultural stakeholders identified in this analysis represent driving forces in the development of equity and inclusive education policy in Ontario. Their involvement in the process of agenda-setting was evident in so far as they emphasized the need for equity in

Ontario's education system. Moreover, the recommendations offered by AMENO, People for Education, and Egale Canada are evidence of their involvement in the process of policy formulation.

AMENO and Egale Canada continue to be involved in supporting the enactment of PPM No. 119 [2009]. For example, following the release of PPM No. 119 [2009], AMENO welcomed the equity strategy and supported its release by hosting an inclusive leadership forum, *Achieving Equity in Ontario Schools* (May, 2009), and the *Equity and Inclusive Education: Keys to Successful Implementation* conference (May, 2012), bringing together educators, administrators, trustees, parents, and community members to address the challenges faced in implementing Ontario's equity and inclusive education strategy, and to share practical strategies and resources for successful implementation of the strategy (AMENO, 2012). Similarly, Egale Canada, continues to call on Ministries of Education to require the inclusion of anti-homophobia, anti-biphobia, and anti-transphobia and intersectionality measures in safer schools policies and programs, along with steps for the effective implementation of these policies (Taylor et al., 2011).

Political Context

In contrast to rationalist conceptions of public policy making, the development of education policy is often described as more disjointed, less rational, and more political (Taylor, Rizvi, Lingard, & Henry, 1997). Political decisions about the allocation of values are inevitably present at the micro and macro arenas of educational policy making (Delaney, 2002; Stout, Tallerico, & Scribner, 1994).

We begin with a survey of the role of various professional education associations in Ontario. Although documents were collected from various organizations representing leaders in education, principals, and teachers, many of these organizations were involved in the process of implementation as opposed to development. The Ontario Public Supervisory Officials' Association (OPSOA) and the Ontario Public School Boards' Association (OPSBA) both highlighted issues of equity in Ontario's education system and acknowledged education as a fundamental right.

Education policy related to equity and inclusion has been subject to great fluctuations and inconsistencies as a result of political cycles, elections, and the different ideologies of successive governments. It is clear that the political cycle was a determining factor in the development of equity and inclusive education policy (Anderson & Ben Jaafar, 2006). The shift of political power from Bob Rae's NDP government to the Conservatives led by Mike Harris had dire consequences for the development and implementation of PPM No. 119 [1993] (Ontario Ministry of Education, 1993). During this period, Dei noted a "gradual decline of anti-racism initiatives at government/ministerial levels in Ontario" (2003, p. 3).

The election of Dalton McGuinty and the Liberal party in 2003 marked a renewed commitment to public education. Upon taking office, the McGuinty government "set in motion a different approach to education policy and improvement" beginning with a reversal of the many policy initiatives that had been tabled by the Conservative regime, including legislation related to school board governance, funding formulas, and labour disputes with teachers (Anderson & Ben Jaafar, 2006, p. 26). In a press release dated April 6, 2009, titled "Helping More Students Succeed," the McGuinty government announced the launch of Ontario's equity and inclusive education strategy. According to the press release, "by promoting inclusive education, the

strategy will help schools better address barriers related to sexism, racism, homophobia and other forms of discrimination, which may have an impact on student achievement” (Ontario Ministry of Education, 2009, April 6).

It is important to discuss the influence of Kathleen Wynne, as Minister of Education, in the development of PPM No. 119 [2009]. A member of provincial parliament since 2003, Wynne was appointed Minister of Education in 2006 until 2010. Wynne was and continues to be an advocate for equity issues. In her role as Minister of Education, Wynne headed efforts to reduce class sizes at the elementary level and increased graduation rates at the secondary level. On April 8, 2009, Wynne stood before the Legislative Assembly of Ontario and announced Ontario’s equity and inclusive education strategy, which received unanimous support from political opponents:

It is with great pleasure that I rise today to talk about the Ministry of Education’s equity and inclusive education strategy called *Realizing the Promise of Diversity*. I’m very pleased to do this because I believe that this strategy will make a huge difference to students, to parents, to teachers, to administrators, to support staff and to school communities all over Ontario. (Legislative Assembly of Ontario, 2009)

To construct an understanding of the political processes that took place at the Ontario Ministry of Education during the development of equity and inclusive education policy, four memoranda, issued on behalf of the Ministry of Education, were collected and analyzed. The first memorandum, released March 2008, announced the ministry’s intention to create an equity and inclusive education strategy (Glaze & Mock, 2008). A second memorandum, released almost a year later on February 18, 2009, by Joan Fullarton, regional manager at the Ministry of Education, stated that the ministry intended to issue a policy/program memorandum to provide schools boards with direction when developing, implementing, and monitoring equity and

inclusive education policies (Fullarton, 2009). The third memorandum, released November 3, 2009, from Ruth Flynn, director of the ministry's inclusive education branch, announced a symposium that would be hosted by the ministry to support the implementation of PPM No. 119 [2009] (Flynn, 2009). The final memorandum, issued April 8, 2010, by Ruth Flynn, announced the release of the equity policy guidelines designed to assist school boards in developing, implementing, and monitoring equity education policies, as mandated by PPM No. 119 [2009] (Flynn, 2010).

Finally, in discussing the role of the Ontario Ministry of Education, it is important to note their consultations with several prominent leading school boards in Ontario with model policies and initiatives related to equity and diversity. In developing the equity strategy in Ontario, the ministry hosted the Toronto District School Board, Peel District School Board, Greater Essex County District School Board, and Ottawa-Carleton District School Board to form the minister's Ad Hoc Equity Roundtable to consult on the development of the equity strategy.

It is also important to consider the role of street-level bureaucrats, specifically, those involved in key school districts, most notably, the Toronto District School Board, in influencing the development of Ontario's equity strategy. The TDSB has developed the Equity Policy Advisory Committee that meets regularly to discuss equity issues and support the development and implementation of Ontario's equity strategy. For example, minutes from these meetings were collected from June 16, 2008, Thursday October 22, 2009, and October 30, 2009. Documents collected from the TDSB, such as the "Equity Foundation Statement and Commitments to Equity Policy Implementation" (2000), illustrate their leadership role in equity and inclusive education policies and practices. The development of Ontario's equity and inclusive education strategy

very much reflects significant strides in equity and inclusion that have been and continue to be made in key school districts such as the TDSB.

Legal Context

If one seeks to determine what the policy really is, certainly one of the first sources to consult is written law (Fowler, 2009). Major legal frameworks and pieces of legislation, both at the federal and provincial levels, have shaped the options available to policy makers at the Ontario Ministry of Education.

At the federal level, part VI of the Constitution Act, 1867, speaks to the distribution of powers between the federal and provincial government. Specifically, Section 93 of the Constitution Act, 1867, mandates education as a provincial responsibility. Two important clauses from the Charter have also influenced the development of education policy in Ontario: section 15, outlining equality rights, and section 27, the multiculturalism clause. Section 15 guaranteed equality and fairness under the law and across all levels of government. Section 27 of the Charter, the multiculturalism clause, is an interpretive clause and has legislated additional clout to multiculturalism policy in Canada.

At the provincial level, two major pieces of legislation have shaped the contours of equity and inclusive education policy in Ontario: the Ontario Human Rights Code and the Education Act. The Ontario Human Rights Code (the Code) seeks to prevent prejudice, discrimination, and harassment with respect to a variety of services in Ontario, education being but one. The Education Act is the primary piece of legislation that dictates education policies and practices in Ontario. Part I of the Education Act legislated the scope of activities and responsibilities of the Ministry of Education and Training. Section 8, subsection 29, stated that the minister may

“require boards to develop and implement an ethnocultural equity and anti-racism policy, to submit the policy to the Minister for approval and to implement changes to the policy as directed by the Minister.” This legislation was introduced as part of an amendment to the Education Act under PPM No. 119 [1993].

Part XIII of the Education Act pertained to behaviour, discipline, and safety in Ontario schools. Most recently, two bills have amended the Education Act related to discipline and school safety: Bill 212: Progressive Discipline and School Safety, 2007, and Bill 157: Keeping Our Kids Safe at School, 2010. Bill 212 and Bill 157 can both be understood as examples of legislation that reflect the ministry’s safe schools initiative and the currency of anti-bullying strategies as an equity concern prior to the issuance of PPM No. 119 [2009].

Economic Context

The economic ideology of neoliberalism, its adoption by the Harris Progressive Conservative government, and its embodiment in the Common Sense Revolution are particularly important when examining the economic context from which PPM No. 119 [2009] developed. The election of Mike Harris’ Progressive Conservative government in June 1995 would have lasting impacts on the policy and practice of education in Ontario. Harris’ platform, expressed in the manifesto the Common Sense Revolution, would bring neoliberal policies to Ontario. With respect to education, the Ontario Conservative government’s platform “emphasized the reduction and rationalization of education expenditures, increased government control of teachers’ working conditions and compensation, and quality control through increased accountability for local spending and student learning outcomes in relation to centrally prescribed goals and standards” (Anderson & Ben Jaafar, 2006, p. 51). This platform took shape through key pieces of legislation

including Bill 104: Fewer School Boards Act, 1997, Bill 160: The Education Quality Improvement Act, 1997, and Bill 45: Equity in Education Tax Credit.

A series of new discourses emerged in the publicly funded education system in Ontario as a result. According to Kuehn and Shaker, “a struggle dominates education, these days. It is struggle between demands for standardization and the reality of diversity” (2010, p. 21).

Advocates of standardization argued that it would create a system that is more accountable to the public, ensured through the application of a standardized curriculum and measured through the use of high-stakes standardized testing. The idea of standardization stands in direct opposition to the idea of diversity; Ontario’s classrooms are diverse spaces, and yet “this diversity chafes against a system that is about ‘alignment’ with external goals that are standard and measurable and dealt with as a contract” (Kuehn & Shaker, 2010, p. 22)

Closely linked with the system of standardization described above, is the idea of accountability. As a public institution, Ontario’s education system is held accountable to the citizenry of Ontario. Accountability is ensured through a variety of organizations such as the Education Quality and Accountability Office (EQAO) and the Ontario College of Teachers (OCT), both created under the Harris government.

The necessity of capitalizing on diversity is another discourse that emerged from various collected documents. The rationale for equity and inclusive education policy is embodied in the title of the equity and inclusive education strategy document, *Realizing the Promise of Diversity*. According to this document, “today’s global, knowledge-based economy makes the ongoing work in our schools critical to our students’ success in life and to Ontario’s economic future” (Ontario Ministry of Education, 2009d, pp. 5–6). As was the case with multiculturalism, equity

and inclusive education are constructed as having the potential to create economic advantages for the province of Ontario.

The relevancy of the shift to neoliberal economic policies cannot be understated in influencing the development of equity and inclusive education policy years later. In January 2003, a report released from the Ontario Institute for Studies in Education (OISE) at the University of Toronto titled *The Schools We Need: A New Blueprint for Ontario*, described the economic policy trends in education under the *Common Sense Revolution*:

the government's strategy for educational reform in Ontario over the past seven years has combined greater accountability, at all levels of the system, with fiscal restraint. The underlying assumption seems to be that with greater accountability and a new curriculum, teaching and learning would improve, even with fewer resources . . . increased efficiency would compensate for any reductions in funding and other resources. (Leithwood, Fullan, & Watson, 2003, p. 7)

Speaking on behalf of marginalized students across Ontario, the report urged that the school system is becoming a harsh environment for less advantaged and diverse student populations, particularly special needs and ESL students. The report cited high failure rates associated with the Grade 10 literacy test and increased drop-out rates for students in applied streams. It is within this context that the rationale for greater equity and inclusion in the education system became abundantly clear.

Discussion: Liberal Multiculturalism, Equity, and Democratic Racism

Stemming from these described findings is the crucial point that multiculturalism, as an ideology, is an important discourse in Canadian society that reaches many political and social institutions in its influence. The ideologies associated with liberal multiculturalism, including respect, acceptance, and inclusion, were identified as a focus of multiculturalism as public policy and practice in Canada (Fleras & Elliott, 1999). Our analysis exhibited the influence of liberal

multiculturalism as a discourse shaping the development of public policy broadly, and also education policy.

According to Fleras and Elliott (1999), multiculturalism as a practice highlights the role of policy actors in constructing multiculturalism as a renewable resource with economic and political potential. Multiculturalism as a practice, along with the construction of diversity as an avenue for political and economic prosperity (Abu-Laban & Gabriel, 2002; Mitchell, 1993), was adopted as the ideological rationale supporting the development of equity and inclusive education policy. Bureaucrats and policy advisors at the Ministry of Education constructed Ontario's diversity as an exploitable resource. This construction served as the rationale for and driving force in the development of equity and inclusive education policy. According to PPM No. 119 [2009], Ontario schools "need to help students develop into highly skilled, knowledgeable, and caring citizens who can contribute to both a strong economy and a cohesive society" (Ontario Ministry of Education, 2009c, p. 2). Equity and inclusive education are constructed as an opportunity to capitalize on diversity, a key element in creating a politically active and economically productive citizenry.

Numerous scholars have insisted upon the inadequacy of Canada's federal policy on multiculturalism in combating prejudice and discrimination in school, evidenced by a Eurocentric curriculum, the streaming of at risk students into applied settings, and increased dropout rates among racialized students (Ghosh & Abdi, 2004; Harper, 1997; James, 2007); hence the shift from multiculturalism to equity. While liberal ideologies have influenced multiculturalism policy and programming, the theme of equity seems to have emerged as the ideological foundation of the policy and practice of multicultural education in Ontario. PPM No. 119 [2009] acknowledged the intersectionality of socially constructed forms of difference and

the institutional barriers inherent in Ontario's education system as a result. The documents collected from the Ministry of Education, including both versions of PPM No. 119 [1993, 2009], the strategy document (Ontario Ministry of Education, 2009e), and the guidelines document (Ontario Ministry of Education, 2009a) demonstrated that the Ministry of Education was attempting to move beyond a focus on multiculturalism to "a system-wide approach to identifying and removing discriminatory biases and systemic barriers to help ensure that all students feel welcomed and accepted in school life" (Ontario Ministry of Education, 2009c, p. 3). This system-wide approach and the acknowledgement of institutional barriers to equity offered by the ministry were echoed by a variety of stakeholders during the agenda-setting and policy formulation stages, specifically AMENO, People for Education, and Egale Canada.

However, the analysis of various policy documents collected from the Ministry of Education, revealed that equity is constructed as a necessary condition to meet the three core priorities for public education in Ontario: high levels of student achievement, reduced gaps in achievement, and increased public confidence in the public education system. Furthermore, the first of the eight guiding principles presented in PPM No. 119 [2009] stated that equity and inclusive education are a foundation of excellence. Documents collected from the Ministry of Education traced a definite connection between equity and excellence, leaving one to question whether or not equity is constructed as a vehicle for achieving excellence in education evidenced by increased student achievement. Building on the works of other researchers, Stout et al. (1994) argued that stress in the development of education policy arises from conflicts between key values of equity, efficiency, choice, and quality (excellence). Sergiovanni, Kelleher, McCarthy, and Fowler (2009) maintained that equity and excellence are competing values. According to Ghosh and Abdi (2004), "policy makers have created a false dichotomy between equity and

quality, and have often aimed at achieving one at the expense of the other” (p. 49). This study provided empirical evidence of the inherent conflict between equity and excellence during the development of education policy.

Ultimately, the focus on equity in the policy documents is overshadowed by the continued presence of ideologies of liberal multiculturalism. Researchers (Henry & Tator, 1999; Henry, Tator, Mattis, & Rees, 1999) identified the existence of democratic racism in Canada as an invisible system of domination and exclusion that operates on the social construction of difference, is culturally reproduced through behaviours, texts, and images across Canada’s institutions, and is upheld through laws and policies related to multiculturalism. Our findings revealed the role of liberal multiculturalism in influencing the development of equity and inclusive education policy in Ontario, despite a simultaneous shift to equity as the ideological foundation of education policy and systemic approaches to the realization of equity in the education system. Ghosh and Abdi (2004) asserted that for education policy to be successful in creating an equitable education system, policy directives must acknowledge the social construction of diversity and its impact on identity formation, student learning, and achievement. However, if these goals remain framed within the discourse of liberal multiculturalism, the achievement of equity may continue to evade Ontario’s education system.

Theoretical Analysis

Unfreezing and Refreezing the Status Quo in Policy Development

In the policy process, macro-level contextual forces are shaped by idea sets, stakeholders, and institutional arrangements that can be represented as driving forces in the development of specific policies. Applying Lewin’s (1947) three-step model of social change to the development

of equity and inclusive education policy was instrumental in conceptualizing the macro-level contextual forces, as well as the ideas, actors, and institutions that shaped these forces through their role as agents in creating the conditions for unfreezing and refreezing the status quo during the process of policy development.

The entrenchment of multiculturalism policy through legislation, evidenced by the inclusion of a multiculturalism clause in the Canadian Charter of Rights and Freedoms and the institutionalization of multiculturalism in the Canadian Multiculturalism Act, are examples of legislation that contributed to unfreezing the social condition contributing to the development of equity and inclusive education policy. During this period, for many racialized communities, the need for dismantling racial barriers to opportunity or inclusion was more important than the celebration of their cultural differences (Fleras & Elliott, 1999).

In 1993, the Ontario Ministry of Education released PPM No. 119: “Antiracism and Ethnocultural Equity in School Boards: Guidelines for Development and Implementation.” Chan (2007) and Dei (2003) argued that, although the policy was only marginally successful, it did highlight issues of inequity in Ontario’s education system and can therefore be conceptualized as one of the conditions that led to the unfreezing of the status quo, contributing to the development of PPM No. 119 [2009] nearly fifteen years later. While the release of PPM No. 119 [1993] marked the point at which equity issues in education first appeared on the ministry’s radar, the safe schools initiative at the Ministry of Education contributed to the ideological embedment of equity and inclusion at the Ministry of Education. According to the analysis, the ideas of equity and inclusion as expressed in the safe schools initiative were remarkably consistent with the ideological foundations of equity and inclusion as documented in PPM No. 119 [2009]. The term

inclusion appeared throughout many of the documents associated with the safe schools initiative from the Ministry of Education and was also explicitly referenced in PPM No. 119 [2009].

Refreezing the social condition following the release of the equity and inclusive education policy directive helped reinforce the ideas and initiatives presented in program/policy memorandum in order to support its implementation. Following the release of PPM No. 119 [2009], the Ministry of Education provided the guidelines document. According to the analysis, this document aimed at assisting school boards with guidelines and resources when developing, implementing, and reviewing equity and inclusive education policy. The Ontario Teachers' Federation Safe@School project, the Ontario College of Teachers Inclusive Classroom Specialist AQ, and the Ontario Principals' Council equity and inclusive education resources are evidence that these professional education associations were actively involved in working to refreeze the status quo following the release of PPM No. 119 [2009] in order to support the implementation of the policy. Alongside organizations representing the interests of education leaders and teachers, other provincial organizations, specifically the Ontario Education Services Corporation and the Ontario Human Rights Commission, were active driving forces in refreezing the social condition to ensure the implementation of PPM No. 119 [2009].

One of the important discourses that emerged from many of the collected documents was *accountability*. Stakeholder groups such as AMENO articulated that accountability was a necessary condition in equity and inclusive education policy established through the creation of specific goals and measured through audits. Furthermore, the Ministry of Education articulated that accountability was one of the core priorities of the equity and inclusive education strategy, stating that “accountability and transparency will be demonstrated through the use of clear measures of success (based on established indicators) and through communication to the public

of our progress towards achieving equity for all students” (Ontario Ministry of Education, 2009a, p. 12). The theme of accountability and the establishment of accountability measures are important agents in refreezing the status quo following the issuance of PPM No. 119 [2009] to ensure its implementation.

Rethinking the Policy Cycle

The policy analysis revealed varied actor involvement in the first three stages of the policy making cycle. In *agenda-setting*, a wide range of policy actors were involved; in *policy formulation*, a smaller subset of policy actors was involved; while only a few authoritative government decision-makers participated in the *decision-making*.

The analysis conveyed the role of many different actors and organizations that were involved in the process of agenda-setting by urging that equity and inclusive education was a pertinent issue in Ontario that required government attention. AMENO, People for Education, and Egale Canada identified as important socio-cultural stakeholder groups, advocated for an equitable and inclusive education system in Ontario. Perhaps the most influential figure involved in placing the issue of equity on the government’s formal agenda was Minister of Education Kathleen Wynne. To understand the significance of Wynne’s contributions to the development of equity and inclusive education policy in Ontario, it is pivotal to consider the concept of the policy window presented by Kingdon (1984) to explain the role played by *policy entrepreneurs* both inside and outside of government in constructing and utilizing agenda-setting opportunities, so-called *policy windows*, to bring issues onto government agendas. The *discretionary political window* (Howlett et al., 2009, p. 105) acknowledged that the behaviour of individual political actors leads to less predictable window openings. This political window adequately accounts for

the instrumental role played by Wynne in placing the issue of equity on the government's agenda and shaping the content of PPM No. 119 [2009] through her actions at the Ministry of Education.

As the policy cycle shifted from agenda-setting to policy formulation, a smaller subset of policy actors and organizations was involved in presenting possible solutions to the issue of equity and inclusion in Ontario's education system. According to the analysis, AMENO, People for Education, and Egale Canada were the most prominent stakeholder groups involved in this process. Some of the recommendations offered by these stakeholders were subsequently reflected in PPM No. 119 [2009].

The stage of decision-making involved only the authoritative government decision-makers, notably those policy actors and bureaucrats at the Ministry of Education, including Kathleen Wynne, her advisors Avis Glaze and Karen Mock, and members of the inclusive education branch led by director Ruth Flynn. The release of the strategy document, PPM No. 119 [2009], and the guidelines document showed that the ultimate decision of what would be included and excluded from PPM No. 119 [2009] belonged to Wynne's policy advisors and the inclusive education branch at the Ministry of Education. Although documents collected from the Ontario Ministry of Education illustrate that stakeholder groups were not officially included in the final decision-making aspect of the policy development process, it should nonetheless be noted that the stage of decision-making closely followed the direction and recommendations put forward by stakeholder groups such as AMENO, People for Education, and Egale Canada.

Conclusions and Implications

Along with conclusions for this study, we would like to offer implications stemming from our research: for *policy*, to inform the actions of policy makers during the stages of development

and implementation; and *further research*, to explore new research questions that have risen from the present course of study.

Adding to two tensions (federal–provincial; ministry–school boards) that characterize the development of education policy in Canada (Joshee, 2004), our study has shed light on a third dimension—the tension between school boards and schools. The policy approach mandated by PPM No. 119 [2009] required the creation of board-wide policies on equity and inclusion. Such a policy approach to achieving equity in Ontario’s education system may seem problematic as it assumes a degree of uniformity in schools across a given district, an assumption that inherently contradicts the ideological foundation of equity that is embedded in PPM No. 119 [2009]. The process of policy development needs to be more inclusive of actors at the school level, not just the district level. The values, beliefs, attitudes, and experiences of principals, educators, and support staff must be made more visible during the process of policy development in order to provide these important stakeholders with the resources to influence the development and implementation of locally responsive equity education policies.

Our analysis has illuminated the ways in which the process of policy development is a hierarchical exercise, an exercise of the power of the dominant groups in society. The process of developing education policy in Ontario should in itself be a more inclusive process where the identities, values, beliefs, and experiences of the broader community and, in particular, students are also reflected. The question remains to be answered as to whether a hierarchical process of policy making can result in the realization of equity in Ontario’s education system.

Finally, there is a need to explore the process of implementation of equity and inclusive education policy in Ontario as mandated by PPM No. 119 [2009], a topic that was located outside the scope of the present study. While PPM No. 119 [2009] included some definitions,

concepts, and goals that were consistent with the achievement of equity in Ontario's education system, the degree to which this policy directive can be translated into effective equity education policy statements at district school boards across Ontario should be studied. Further research is needed to explore the content, development, and implementation of equity and inclusive education policies in school boards across Ontario.

Once the process of implementation has been studied, a thorough policy analysis of PPM No. 119 [2009] must be conducted to provide not simply a description of equity and inclusive education policy development, but normative approaches for policy development that may inform the process of education policy making in Ontario. Broadly speaking, this objective can be achieved through further qualitative studies focused on the attitudes, beliefs, experiences, and actions of policy makers and implementers, including ministry authorities, school board officials, education administrators, and teachers, as well as the groups affected by equity education policy, including students, caregivers, and community members.

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