

## 報告 2

### ニュージーランドの特殊教育と統合教育

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教育ネットワーク研究室では、尾形尚子基金の協力を得て、ニュージーランド・ワイカト大学・教育学部教授のデイビッド・ミッチェル先生を講師に2001年1月12日(金)第1回目の招待講演会を開催した。

ミッチェル教授の専門は特殊教育だが、ニュージーランド政府の教育関連アドバイザーもつとめ、教育全般にわたっての造詣が深い。

ニュージーランドでは、先住民であるマオリの子どもたちに対する教育が非常に重要な位置を占めている。これらのニュージーランドの教育に対する考え方は、日本の障害児教育に関してはもちろんのこと、教育一般にとっても多くの示唆を与えてくれる。

講演会では、50名近くの学生や大学院生、そして現場の先生方にも参加いただき、熱心な質疑応答も行われた。

以下に、ミッチェル教授の当日の講演内容を、掲載する。

(渡部信一)

## **SPECIAL EDUCATION AND INCLUSIVE EDUCATION IN NEW ZEALAND**

**David Mitchell, PhD**

**University Of Waikato  
and  
Hyogo University of Teacher Education**

**Inaugural Ogata Naoko Annual Lecture presented  
at the Graduate School of Education Tohoku University**

Let me begin by thanking Professor Sugai for honouring me with an invitation to present the inaugural Ogata Naoko Lecture. I am delighted to be able to make this presentation to an audience that undoubtedly contains some of Japan's future educational leaders.

This is my second visit to Sendai and, I think, my seventh to Japan. My wife and I have many professional links with scholars in your country, such as Associate Professor Shinichi Watabe, whom I would like to thank most sincerely for his excellent arrangements for our visit. We also have a close personal interest in your country for our son and his Japanese wife and Japanese-New Zealand daughter presently live here.

In today's lecture, I will briefly describe the New Zealand society, its education system and provide a more detailed outline of its special education system. As I believe that New Zealand has one of the most inclusive education systems in the world, I will make particular mention of this aspect.

The following paper represents a greatly expanded version of my lecture. It draws upon several of my earlier writings, including Mitchell, 1987, 1997, 1999, 2000, and a report I submitted to the project, Comparative Study on Integration, at the Hong Kong Institute of Education in September 1999.<sup>1</sup>

### **Introduction**

New Zealand is a one-chamber parliamentary democracy with a monarchy as the nominal head of Government. Its population of 3.8 million people live in a country about the area of the British Isles or two-thirds the area of Japan. The ethnic identities of students in schools are as follows: European (mainly British extraction): 65%; Maori 20%; Pacific Island 7.2%; Asian 6.6%)

In recent years, New Zealand has more explicitly recognised that the Treaty of Waitangi, which was signed by the British Crown and the Maori tribes in 1840, should be honoured. As a consequence,

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<sup>1</sup>The paper takes no account of recommendations in an extensive review of special education policies carried out in late 2000 which, at the time of writing, were being considered by the government.

bi-culturalism is increasingly being pursued in all facets of society - not least of which in education.

Education is compulsory for all students aged 6 to 16 years. In practice, almost all children commence their schooling on the day of their fifth birthday, while 85% of 16-17 year-olds, 63% of 17-18 year-olds and 16% of 18-19 year-olds continue with their schooling. During the compulsory education period, there are three main tiers of schools: primary schools (5-11 year-olds), intermediate schools (12-13 year-olds) and secondary schools (14-19 year-olds). Some schools, usually in rural areas, retain intermediate-age students as an integral part of a full primary school and some, called 'area schools', provide schooling for all three levels in the one school. There are high participation rates in preschool education, with 99.5% of 4-5 year-olds, 90.3% of 3-4 year-olds, 55.9% of 2-3 year-olds, 34.8% of 1-2 year-olds, and 13.6% of children under 1 year-old enrolled in some form of early childhood education programme.

Any analysis of New Zealand's special education system must be embedded in the broader framework of the national education system - a system that has undergone dramatic change since October 1989. These reforms are similar to those that have occurred or are in process in many other countries, but have gone further and faster than in most. Some of the key elements include:

- (a) the separation of policy, regulatory and delivery functions in education;
- (b) a shift from the use of input controls to a reliance on quantifiable output measures and performance targets;
- (c) the reduction of public monopolies; and
- (d) a shift of responsibility for the governance and management of learning institutions (e.g., schools) from the centre to elected boards of trustees responsible for individual institutions.

For the most part, these reforms were expressed in the Education Act 1989 and had earlier been outlined in the Picot Report (Taskforce to Review Education Administration, 1988) and in a Government document, *Tomorrow's Schools* (Lange, 1988). They were based on five fundamental principles of equity, quality, efficiency, effectiveness and economy.

When applied to the education system, these principles resulted in the following:

- The institution (e.g., a school) is the basic 'building block' of educational administration, with control over its educational resources being used as it determines, within overall guidelines set by the Minister of Education. Unlike Japan, where there are four tiers of administration (national, prefecture, municipality and school), in New Zealand no intermediate bodies exist between the Ministry of Education and the individual school. Indeed, the 1989 reforms abolished the 12 education boards that used to serve at that level.
- The institution is run as a partnership between the professionals and the particular community in which it is located. Boards of trustees, with governance responsibilities, are the mechanism for this partnership. In primary and intermediate schools these boards comprise elected parent representatives, one elected staff representative and the principal. As well, secondary schools

and schools with a secondary component are required to have a student representative. Schools may co-opt up to four persons, having regard to the type of skills needed to function effectively, the ethnic and socio-economic composition of the school's student body and the country's gender balance.

- The institution sets its own objectives, within the overall national guidelines set by the Minister of Education. These objectives should reflect the particular needs of the community in which the school is located and should be clearly set out in the institution's charter which acts as a contract between the institution and its community, and between the institution and the Minister.
- The Ministry of Education provides policy advice to the Minister, administers property, and handles financial flows and operational activities.
- Each institution is accountable for the Government funds it spends on education and for meeting the objectives set out in its charter. To ensure that this accountability obligation is met, the Education Review Office reviews learning institutions every three years.

#### **Schools' Obligations to Students with Special Education Needs**

As far as students with special education needs (hereafter referred to as SEN) is concerned, the *Tomorrow's Schools* reforms dispersed responsibility among the above agencies, all under the general overview of the Minister of Education.

#### *School Charters*

The boards of trustees of all government schools are required to include the following goal in their charters:

To enhance learning by ensuring that the school's policies and practices seek to achieve equitable outcomes for students of both sexes; for rural and urban students; for students from all religions, ethnic, cultural, social, family and class backgrounds and for all students, irrespective of their ability or disability. (Department of Education, 1989, p. 10)

The Ministry of Education is responsible for ensuring that this objective is appropriately addressed in schools' charters and the Education Review Office is responsible for seeing that schools meet the objective.

As well as the above requirement for school charters, there are several official statements relating to New Zealand schools' responsibilities towards SEN:

#### *Section 8 of the Education Act 1989*

The Education Act 1989 specifies that "people who have special education needs (whether because of disability or otherwise) have the same right to enrol and receive education at state schools as people who do not." Under this legislation, all students between the ages of 5-19 years are entitled to free

enrolment and education in any state school. The exceptions envisaged are when the Secretary of Education agrees with a student's parents that a student should be enrolled at a particular state school, special school, special class, special clinic or special service. The Secretary also retains the right to direct the student's parents to so enrol the student. In such circumstances, parents have the right to have such a direction reconsidered through a system of arbitration. In fact, only three such directions have occurred since 1989.

*Section 57 of the Human Rights Act, 1993*

This prohibits educational establishments from refusing or failing to admit a student with a disability; or admitting such a student on less favourable terms and conditions than would otherwise be made available, except where that person requires special services or facilities that, in the circumstances, cannot reasonably be made available. What constitutes 'reasonable' in this clause has yet to be defined.

*National Education Guidelines*

These *Guidelines*, among other things, require each board of trustees, through the principal and staff, to:

- analyze barriers to learning and achievement;
- develop and implement strategies which address identified learning needs in order to overcome barriers to students' learning;
- assess student achievement, maintain individual records and report on student progress (O'Rourke, 1993, p. 3).

*New Zealand Curriculum Framework*

New Zealand has a single national curriculum for primary and secondary schools. At the preschool level, there is a complementary national curriculum. At both levels, the notion of an inclusive curriculum means that there is one curriculum for all students, rather than one curriculum for students in the general education system and another for SEN. This philosophy is made clear by the Ministry of Education in its 1993 (pp.6-7) statement that:

The New Zealand curriculum applies to all schools including kura kaupapa maori and special education schools; all students irrespective of gender, ethnicity, belief, ability or disability, social or cultural background or geographical locations.

And further:

the school curriculum will provide learning opportunities which will enable all students to achieve the learning objectives to the best of their abilities.

This document contains the following statement that is of particular relevance to SEN:

The school curriculum will recognise, respect, and respond to the educational needs, experiences, interests and values of all students: both female and male students; students of all ethnic groups; students of different abilities and disabilities; and students of different social; and religious backgrounds. Inequalities will be recognised and addressed. All programmes will be gender-inclusive, non-racist, and non-discriminatory, to help ensure that learning opportunities are not restricted.

It is acknowledged, however, that individual students will develop the National Curriculum's essential skills at different rates and to different levels of achievement. The challenge is to ensure that all students have positive learning experiences and achieve to the best of their abilities.

A curricular adaptation may be considered as any adjustment or modification in the environment, instruction, or materials used for learning that enhances or allows at least partial participation in an activity. It is generally recognised that adaptations are possible in the following areas:

- the environment;
- materials and equipment (including technology);
- curriculum content; and
- assessment procedures.

A curricular adaptation may fulfil one or more of the following functions:

- it assists the child to compensate for intellectual, physical, sensory or behavioural challenges;
- it allows the child to use his or her current skill level while promoting the acquisition of new skills;
- it prevents a mismatch between the child's skills and the general education lesson;
- it reduces the level of abstraction of the information; and
- it creates a match between a child's learning styles and the teaching styles used.

In making decisions about adaptations, the following factors can be considered:

- ensure that as far as possible, SEN participate in the same activities as other children;
- adapt the environment and instruction before adapting the content;
- introduce adaptations that allow students to participate independently as far as possible; and
- consider how the adaptation will be useful over time and across activities.

Finally, curricular goals can be modified by:

- setting individual achievement objectives;
- teaching the same content, but a less complex level of skill, in the same task;
- ensuring that there is a functional or direct applications of the skills taught;
- adapting skill sequence with a focus on the end product rather than the sub-skills; and
- ensuring that alternative activities are similar or related to the curricular content of the class, are activity-based, are meaningful, and are age-appropriate.

### *Special Education Policy Guidelines*

Released by the Minister of Education in 1995, and republished with minor revisions in 1999, these *Guidelines* are built around seven main principles, each of which carries implications for practice in schools. Four of these are summarised below:

1. Young children and students with special education needs have the same rights to a high quality education as people of the same age who do not have special education needs. This means, for example, that:
  - young children and students with special education needs have access to the same range of age-appropriate education settings as other young children and students;
  - there is a recognition of the legal rights of young children and students with special education needs to enrol and attend school on the same basis as other learners; and
  - educators should have the skills and confidence to assist young children and students who have a broad range of needs and abilities.
2. The primary focus of special education is to meet the individual learning and developmental needs of the young child and student. This means, for example, that:
  - the Individual Education Programme, which occurs within the context of the family..., education setting and community, is the basis of programmes for young children and students with special education needs;
  - schools and early childhood services adapt programmes so that young children and students with special education needs are included; and
  - professional development for regular and special educators, teachers aides and boards of trustees is provided.
3. All young children and students with identified special education needs have access to a fair share of the available special education resources. This means, for example, that:
  - national special education resources are distributed fairly to meet identified special education needs wherever the young child and student is educated; and
  - decisions about individual resource needs are based on valid, fair and culturally appropriate assessment practices.
4. Partnership between students' families/... and education providers is essential in overcoming barriers to learning. This means, for example, that:

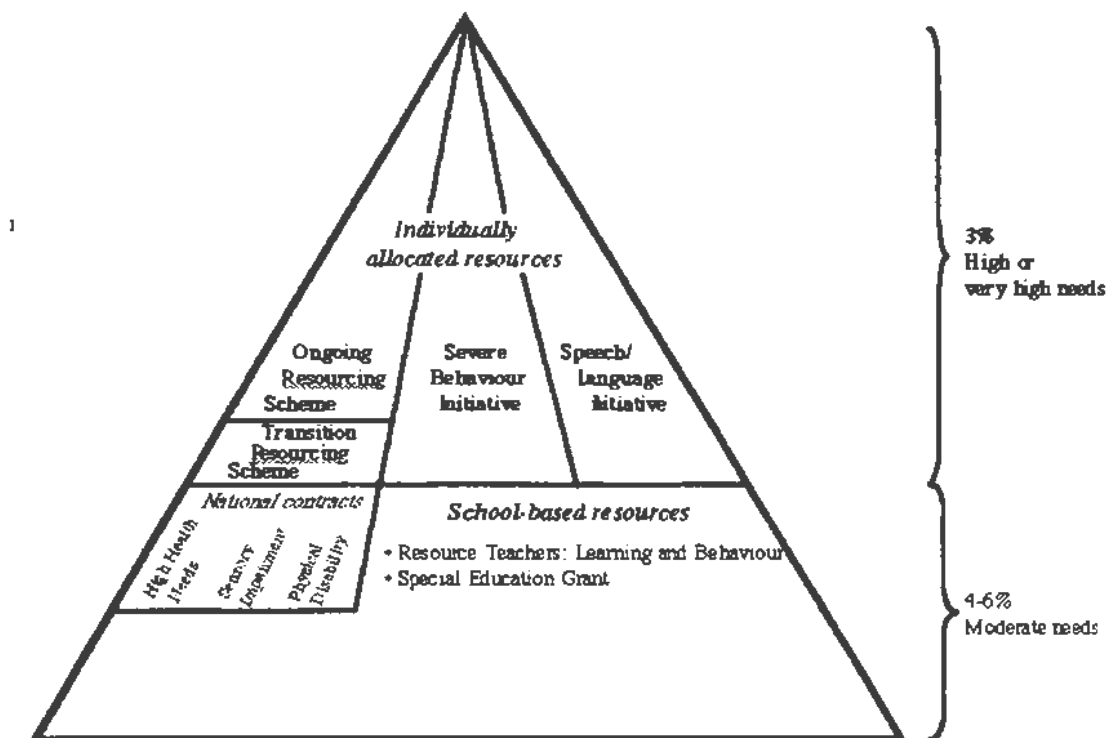
- information about the barriers to learning and the provision of resources is shared between families/... and education providers;
- full information is provided to families/... to enable them to make sound education choices and to participate fully in the enrolment, assessment, planning, programming, placement and monitoring of the young child or student's progress; and
- families/... are able to have placement and other decisions reviewed (Ministry of Education 1995, 1999).

**Special Education 2000**

In 1995-1996, a new policy, *Special Education 2000*, was introduced (Ministry of Education 1996). As expressed by the Government, the overall aim of this policy is to achieve a world class inclusive education system that provides learning opportunities of equal quality to all students. More specifically, the objectives are that SEN will (a) achieve better learning outcomes; (b) be welcome at their local school; (c) benefit from schools having more flexibility in the provision of programmes; (d) receive equitable levels of resourcing according to level of need, whatever their learning environment; and (e) be able to attend the type of facility of their family's choice, where there are enough enrolments.

The provisions made for school-age students with special education needs are portrayed in Figure 1 and are described below. As can be seen in the figure, they fall into two groups: individually-targeted resourcing for the 3% of students deemed to have high or very high needs for support and school-based resourcing for the 4-6% of students with moderate needs.

**Figure 1. Special Education 2000 Framework for Schools**





*Ongoing Resourcing Scheme*

*Special Education 2000* introduced a new approach to resourcing the 1% of students who are estimated to need high or very high levels of support in order to cope with the national curriculum. This is referred to as the 'Ongoing Resourcing Scheme' (ORS). Under it, students with high or very high needs have a guaranteed and ongoing level of resourcing, irrespective of the type of school in which they are enrolled. This resource transfers with the students if they move to another school and should thus allow a much higher degree of choice of school by parents/caregivers. The scheme replaces the previous system, in which categories based on disabilities were used. In ORS, 'ongoing' is defined as *expected to be required throughout the school years* and 'students with high and very high needs' refer to *those who require intensive support to assist their learning or to meet their personal assistance needs at school*.

Those with *very high needs* are defined as requiring one or more of the following:

- Total adaptation of all curriculum content (compared with similar-aged students without special needs). Students in this category will be learning largely through sensory exploration.
- Special assistance to engage in all face-to-face communications. Students who meet this criterion will be totally reliant on the assistance of a trained person for communication through signing or through interpretations of body signals and/or vocalisations.
- Specialist one-to-one intervention at least weekly and/or specialist monitoring at least once a month, together with daily special education support provided by others. This support must be to assist with any or all of: personal care, mobility/positioning/transfers, and needs arising from severe disorder of both language use and appropriate social communication.

These students will require a very high level of continuing intervention and monitoring provided by specialists such as physiotherapists, occupational therapists, conductors, speech language therapists, or psychologists. This intervention will be linked to daily care and supervision needs.

Students with *high needs* require similar, but slightly less intense levels of support to those with *very high needs*. For example, whereas the latter require total adaptation of all curriculum content, the former require significant adaptations of almost all curriculum content.

Students with high or very high needs generate staffing entitlements of 0.1 and 0.2 teacher equivalents, respectively, in addition to their general entitlement. As well, funding is available to purchase support from paraprofessionals, specialists and therapists, with *average* amounts of approximately \$US3,250 and \$US6,000 per year for students with high and very high needs, respectively.

In order to be deemed eligible for ORS, a student must be nominated by an educator (registered teacher, qualified early childhood educator or special educator) who, in collaboration with the student's parents/caregivers, completes an application form. An independent panel of 'verifiers' considers all applications, with some applications being randomly selected for more detailed auditing.

Verifiers review each student included in ORS approximately every three years. Applicants may seek a review of the classification for a student at any time, usually because of a significant change in the student's level of need. If a student's parents or caregivers still disagree with the decision of the verifiers, they may lodge an appeal under the provisions of Section 10 of the Education Act 1989.

Funds allocated for students in ORS are managed in one of two ways. A school or a cluster of schools that has 20 or more students with high or very high needs, can apply to be accredited to hold the funds and purchase the services for those students. Where a school or cluster has fewer than 20 such students, it can seek the approval of the Ministry of Education to be the 'fundholder.' In all other cases, the Specialist Education Service (see below) acts as the fundholder.

#### *Initiative for Students with Severe Behaviour Difficulties*

In 1997, a new approach to managing students with behaviour difficulties was announced. These students are broadly defined as manifesting behaviour that is of such intensity, frequency, duration and severity that it jeopardises or threatens the physical safety of the student or others; severely limits the student's access to ordinary settings; and interferes with the student's social acceptance, sense of personal well-being, and educational performance.

For those with severe difficulties, the initiative contained two elements. Firstly, Behaviour Education Support Teams (BESTs) are set up in a number of locations throughout the country. These teams comprise specialists in behaviour management who are charged with reducing the incidence of severe and challenging students' behaviours in schools, increasing the positive participation in school of such students and enhancing their learning outcomes. They are to respond quickly to students in crisis situations, where the resources of the school and the Resource Teachers: Learning and Behaviour (RTLBs, see below) have reached their limits, and they are to assist teachers and school boards to increase their skills in managing students with severe behaviour difficulties.

The second element is concerned with those cases where intervention by a BEST does not succeed. In these circumstances, students may be referred to a Centre for Extra Support for short-term, intensive programmes. A key objective is to flexibly implement programmes to meet individual students' behaviour and learning needs, with the aim of returning them to regular schooling. This is to be done through regular liaison with the student's home school and with the involvement of parents/caregivers. These Centres will also co-ordinate the students' programmes with other agencies, where appropriate. Students would remain in a Centre for a specified period of weeks or months.

#### *Speech-Language Initiative*

From 1998, the Ministry of Education has provided new funding to provide services for students who have high and very high needs for speech-language therapy, but who are not in ORS. This initiative has three components. The first one is a national training programme for teachers. It aims at providing teachers with information and skills to enable them to make informed management decisions about students' communication delays and disorders. The second component is the continuation of the work of speech-language therapists with students in the classroom, in the home, or

in speech-language clinics. The third component involves the introduction of Communication Support Workers. These people work in classrooms with students who have severe speech-language delays, under the guidance of speech-language therapists.

#### *Special Education Grant (SEG)*

In 1996, a Special Education Grant (SEG) was introduced. This new scheme is designed to assist students with learning and behavioural difficulties who do not qualify for support from other *Special Education 2000* initiatives. Over the whole of New Zealand, it has been estimated that SEG should be targeted at the 4-6% of students with moderate needs (compared with the 3% who have high or very high needs who are separately funded through ORS, the Severe Behaviour Initiative, or the Speech-Language Initiative). SEG is formula-driven. The formula is based on two factors: a school's roll numbers and the socio-economic status of its community. Although schools have discretion as to how they use SEG, it is intended that it be used to provide additional assistance and resources for students with special education needs.

#### *Resource Teachers: Learning and Behaviour (RTLBs)*

RTLBs provide increased support for classroom teachers to help them design and implement appropriate programmes for students with moderate behaviour and learning difficulties. RTLBs are special education teachers who provide advice and guidance to teachers in a cluster of schools and have a high level of skill in developing programmes concerning students who are experiencing short term behavioural and/or learning difficulties. Their role may include direct teaching, particularly demonstrating practices, strategies or techniques that regular classroom teachers can employ to provide appropriate learning programmes and behaviour management for individual students. RTLBs work across a cluster of schools or in a single school as agreed by the cluster committee. They are expected to respond quickly to direct referrals from schools concerning individual students, gather relevant information, and assist teachers to plan an intervention programme and monitor progress. It is intended that they will support their colleagues in modifying the curriculum, their teaching practices and their school systems. Eventually, RTLB positions will be distributed among schools in the ratio of one to every 750 students.

#### *National Contracts for Students with Moderate Sensory Impairments*

In 1998, government announced a new policy for students with sensory impairments who are not otherwise eligible for inclusion in ORS, but for whom it would not be reasonable to expect schools to meet their needs through SEG. These students would normally have just missed out on being included in ORS. Some will require support on an intermittent or regular basis throughout their schooling, others may require intensive support for a short duration.

#### *Services for Students with High Health Needs*

In 1998, government announced a new policy for students with high health needs - students who are absent from school for significant periods because of their need for medical treatment or because of chronic illness. They may require support to make a transition back into their home school. This group would also include students with a psychiatric illness who are resident in a health-funded institution. Three regional hospital schools are responsible for governing and managing a teaching service for students with high health needs in their respective regions.

#### *Students with Physical Disabilities*

Also in 1998, government announced a new policy for students with physical disabilities who are not otherwise eligible for inclusion in ORS, but for whom it would not be reasonable to expect schools to meet their needs through SEG. These students would normally have just missed out on being included in ORS. Some of these students will require support on an intermittent or regular basis throughout their schooling. Others may require intensive support for a short duration.

Students with physical disabilities would be eligible for inclusion in this programme if they require support from an occupational therapist and/or a physiotherapist beyond that which could reasonably be expected from a school's SEG.

#### *Specialist Education Services (SES)*

One of the major elements in the Government's restructuring of special education after the introduction of *Tomorrow's Schools* was the establishment in 1989 of the Special (now Specialist) Education Service (SES). Its prime function is to provide advice, guidance, and support for students with difficulties in learning or development. The SES brought together school psychologists, speech and language therapists, advisers on deaf students and visiting teachers. It also took on a new range of functions to do with providing a comprehensive early intervention service for infants and preschool children with special needs and their families. At the time of writing this paper, the role and structure of the SES was under review. Four autonomous regional centres each with 7-10 local centres will possibly replace it.

#### *Identification, Screening and Placement of SSEN*

Screening and identification procedures have undergone considerable change since the introduction of *Special Education 2000*. In recent years there has been a major re-conceptualisation of what is meant by 'special education needs' in many countries. Since 1995, New Zealand has moved from a model based almost entirely on disabilities to one based on ascertaining students' needs for support to manage the national curriculum. This shift actually pre-dated *Special Education 2000* in the professional practices of many professionals who had to make decisions regarding placements of SSEN, but it was officially recognised in *Special Education 2000* policies.

The main reason for the shift centred on the growing awareness that disability categories based essentially on medical factors have limited utility for designing educational programmes. Just as

students with similar disability labels can have quite diverse needs, so too can students with different disability labels have similar needs. Furthermore, in a system of labelling by disability, valuable resources can be tied up in determining which category a student belongs to, with some students inevitably 'falling between the cracks' and some belonging to several categories. Placements of students with special education needs are no longer exclusively dominated by facilities for various disabilities, with many now being included in regular classes.

Psychologists in New Zealand have generally moved away from strictly psychometric assessments, with few using intelligence tests. Rather, psychologists operate as members of teams set up to ascertain what educational and therapy supports a student and his or her family requires. Their work is primarily with students with high or very high needs and their focus is on developing IEPs. However, schools may decide to use their SEG or other funds to 'purchase' the services of a psychologist (from the SES or some private provider) to assess and or provide guidance for students with moderate special education needs. Insofar that psychologists have input into providing information on what resourcing is needed (through ORS), they are indirectly involved in placement decisions. Gone are the times, however, when psychologists were the sole 'gatekeepers' for placements. These days, parents have a considerable say in where their child with high or very high needs is placed, whether it is in a special school, special class, or in a regular class. Such placements are largely negotiated between the parents and the relevant school, although professionals can become involved in the process.

#### *Professional Development for Principals and Teachers*

The notion that schools should become more inclusive permeates *Special Education 2000*. For this to eventuate, Government recognised that teachers, principals and boards of trustees should be given opportunities to gain a better understanding of their legal and professional responsibilities towards SSEN. Accordingly, from 1998 to 2000, professional development programmes are being made available to all schools in New Zealand. These programmes are aimed at supporting boards of trustees, principals and teachers to (a) meet their legal and professional responsibilities with respect to SSEN, (b) understand the principles and main provisions of SE 2000, and (c) develop effective school policies and procedures to enhance the learning outcomes of such students. The Ministry of Education funded a total of 12 professional development programmes to cover the 2,700 schools throughout the country. I was a co-director of two of these programmes.

#### *Early Childhood Special Education*

Early childhood special education focuses on early intervention services provided for young children with high or very high needs. They are provided in the main by the SES (see below) and are available in settings chosen by parents – early intervention centres, regular kindergartens or child care centres, the child's own home or combinations of these. In 1999, of all children enrolled in an early childhood centres, 1.5% had Individual Development Plans. Of these children, 52% were enrolled in education and care centres (i.e., 'child care centres' or 'day care centres') and 38% were in

kindergartens. The services provided for them include teaching advice, speech-language therapy and education support through paraprofessionals (including teacher aides). Physiotherapy and occupational therapy, where appropriate, are provided through health funding.

#### *National Advisory Committee on Special Education*

Another major 'player' in the administration of special education is the National Advisory Committee on Special Education. This committee was set up in 1995 to advise the Minister of Education on special education policies. I have been a member of this committee from its inception.

#### **The Evolution of Inclusive Education for Students with Special Education Needs**

Historically, inclusive education for SEN has gone through several phases, the speed and timing of which reflecting a variety of factors for different categories of student. Notwithstanding New Zealand's current move away from disability categories, I will use them for the purposes of this section of my paper. See Mitchell (1987) for an outline of the history of special education in New Zealand.

#### *Mild intellectual disability*

In New Zealand, this group has progressed through three phases since the first specific educational provision was made for them in 1908. From the outset, the 'Chicago' model of 'ungraded classes' in regular schools, rather than the UK model of special schools, was adopted. The first such class was established in a primary school as early as 1917, but it was nearly another half century (1962) before the first was set up in a secondary school. Some exceptions to this pattern of special classes were present, with small numbers of students with mild intellectual disabilities (referred to as 'backward children') being placed in one of two residential special schools, provided that they also had manifest behaviour disorders (the first such school was set up in 1908). This pattern of provisions continued through to around 1980, when special classes began to be converted into resource classes, with the students spending varying proportions of their time in such classes and in regular classes. Since the early 1990s, in primary schools, this phase has progressively given way to a total inclusion model, with students being placed full-time in regular classes and support being provided to their teachers by special needs personnel. Under *Special Education 2000*, this pattern is likely to be reinforced, with RTLBs playing a significant role. For the most part, inclusive education for these students is now the norm. Secondary schools, however, have tended to continue in the second phase – at least in those schools that have access to 'Experience Classes'.

#### *Moderate/Severe/Profound Intellectual Disability*

Educational provisions for this (admittedly diverse) group of students have gone through several phases. Up to the early 1950s, these children were invariably placed in institutions (New Zealand

even coined a specific name for these institutions: 'psychopaedic hospitals'), or were cared for in their homes. They were deemed to be 'ineducable', or, if they were fortunate, may have been given the appellation 'trainable' – terms which are never used now. These discriminatory provisions slowly gave way to recognition that community provisions should be made for such students. Initially (from 1952), these comprised 'occupation centres' set up by parents of 'intellectually handicapped children'. In the early 1960s, the government took over responsibility for the occupation centres and, in eventually these were recognised as schools. Paralleling these developments was the growing recognition by society and government that institutional placements were discriminatory and resulted in significant damage to the quality of life of the vast majority of their inmates. Since then, these institutions have progressively become de-commissioned, the last one closing in 1999, and community care has become the norm. School integration of these students commenced in the mid-1970s, when the first special schools/units were located on the campuses of regular schools and there were experiments in their students spending some time in regular classes. My wife (Jill Mitchell) was a principal of one such school and I carried out an evaluation of the project that showed very positive outcomes. Since these early moves towards 'locational integration', there has been a steady move towards setting up 'satellite classes' or units for students with moderate/severe/profound intellectual disabilities in regular schools, with these students generally having opportunities for varying amount of time in regular classes. In a growing number of cases, they are fully included in regular classes. However, successive governments have adopted the policy that parents should have the choice of placing their children in special schools and that these will continue to be available while they are supported by enrolments. Thus, inclusive education for this category of students is permitted, but not required.

#### *Sensory Impaired*

As in many countries, the deaf and the blind were the first categories of disability to receive special education. In the first instance, these provisions took the form of residential schools for the deaf (the first in 1880) and the blind (in 1891). The next phase saw the establishment of special classes for the visually impaired and for students with hearing impairment (the first for 'partially hearing' in 1955 and then for 'deaf' in 1960), with itinerant advisers to serve the respective categories. These special classes eventually became converted to resource centres, with the students spending a high proportion of their time in regular classes. The first such centre for visually impaired students was set up in 1964 and the first for hearing impaired students at about the same time. These moves have been paralleled by the gradual reduction of enrolments in the residential special schools.

#### *Physically Disabled*

In New Zealand, the majority of students with physical disabilities have for some time been educated in regular classes. A range of specialist provisions has complemented this pattern. Thus, in 1937, a residential institution for children with poliomyelitis was established, and in 1949 by the first

special schools for students with cerebral palsy was formed. In 1971, the first primary school class for 'physically handicapped' students was established, these students spending some of their day integrated with children in regular classrooms. This was followed in 1977 by the first class for physically handicapped secondary school students. Since then, there has been an increasing trend for students with moderate physical disabilities to be educated in fully inclusive settings. Those with more severe physical disabilities are generally educated in special classes or special schools, with varying periods spent in regular settings.

### *Behaviour Difficulties*

For the most part, students with behavioural difficulties have been educated in regular classes, with assistance provided by various specialists. For example, in 1973, the first 'activity centre' was set up to help 'disturbed' children at selected secondary schools while, in 1975, the first 'guidance unit' was set up, with the primary focus on helping 'maladjusted' children through a team approach directed at the child in his or her own classroom. Exceptions to regular classes include placements in residential schools (when the student also had a mild intellectual disability – see above), in dedicated residential schools (the first in 1960) and in classes for 'maladjusted children' (the first in 1959).

Under *Special Education 2000*, there are three elements of provisions for students with behaviour difficulties. The first is in-school support and guidance provided for teachers by RTLBs. The second element is directed at children with severe behaviour difficulties and involves the setting up of Behaviour Education Support Teams (BESTs) in a number of locations throughout the country. These teams comprise specialists in behaviour management. They are charged with reducing the incidence of severe and challenging children's behaviours in schools, increasing the positive participation in school of such children and enhancing their learning outcomes. They respond quickly to children in crisis situations and assist teachers and boards to increase their skills in managing children with difficult behaviours. The third element involves the establishment of Centres for Extra Support. These facilities provide short-term intensive programmes for the small number of children with severe behaviour difficulties who cannot be managed in their schools. A key objective is to flexibly implement intensive programmes to meet individual children's behaviour and learning needs, with the aim of returning them to regular schooling. This is done through regular liaison with the child's home school and with the involvement of parents/caregivers.

### **Training for Teachers of SSEN in Regular Classes**

Under Section 124A of the Education Act 1989, the Teacher Registration Board (TRB) is required to determine whether or not a person is satisfactorily trained to teach. The TRB has issued guidelines that should be met by teacher education providers. It is noteworthy that these guidelines make no mention of SSEN or to inclusive education, although they do cover relevant generic skills. These include the requirement that programmes must aim to develop abilities in students to, *inter alia*:



- effectively facilitate learning in others;
- understand basic theories which inform our understanding of children, the processes of learning and teaching and the social factors which influence these;
- understand, assess and develop a learner's progress and evaluate and review their teaching;
- fulfil accountability requirements through systems of assessment and reporting to parents;
- satisfy all essential learning areas, essential skills and relevant attitudes and values required for the New Zealand Curriculum for primary and secondary teaching...

In practice, most teacher education providers include at least one mandatory course (out of around 20 courses) on topics directly related to SEN and usually have options available for students to study topics in more depth or with some degree of specialisation. In my own University, for example, the primary pre-service teacher education programme has a compulsory course on 'Inclusive Education' and two courses available as options - one on Educating Learners with Special Needs and another on Educating Gifted Learners.

#### **Training of specialist support staff**

Specialist support staff include the following:

- Psychologists
- Speech and language therapists
- Physiotherapists
- RTLBS
- Hearing advisers

Four colleges of education offer specialist, one year, postgraduate training programmes for experienced teachers in regular education who wish to work in special education. The School of Special Education at Auckland College of Education offers diplomas in early intervention, education of students with special teaching needs, education of students with visual impairment and advisers on children who are deaf and hearing impaired. The diploma in education for students with special teaching needs is also offered at three other colleges of education (Wellington, Palmerston North and Christchurch), the latter also offering diplomas associated with hearing impairment.

Certificate and diplomas in teaching people with disabilities are available at polytechnics and colleges of education throughout New Zealand and are of particular relevance to human service workers and teacher aides and assistants.

Two universities (Massey and Auckland) train educational psychologists in post graduate programmes. Three universities (Massey, Waikato and Auckland) offer two-year, masters-level programmes in special education. These are generic in character, although some specialisation is

possible within the selection of optional courses. All of these programmes require candidates to have had prior professional experience - usually as a teacher.

Speech and language therapists are trained through a bachelor's degree programme at the University of Canterbury.

Physiotherapists are trained at the School of Physiotherapy at Otago University or at the Auckland Institute of Technology. The Bachelor of Physiotherapy is a four-year course consisting of the first year of Health Sciences papers followed by three years of professional physiotherapy papers.

Occupational therapists are trained at the School of Occupational Therapy at Auckland Institute of Technology, where they undertake a three year Bachelor of Health Studies (Occupational Therapy).

RTLBs are trained at graduate or postgraduate level by a consortium of Waikato, Auckland and Victoria Universities, in a contract with SES and funded by the MoE. Delivery is through a series of block courses in regional centres, on-line interactive learning and discussion, and individual school-based practical assignments. The programme provides a consultative and collaborative model for improving the ways schools could meet the needs of children with learning or behaviour difficulties. The four courses making up the RTLb programme are intended to incorporate the following principles and perspectives: an educational (ecological) model for special need provision; an inclusive teaching approach; a consultative and collaborative approach; Te Ao Maori (A Maori World View); bicultural and multicultural partnerships; data-based decision making; and reflective practice.

Teacher aide training is not compulsory, but many who take on these positions have a professional background in teaching or social services. Several tertiary institutions offer training programmes, one of which is available via distance learning. People who undertake these courses are usually more successful in winning positions and in negotiating higher salaries. The Certificate for Teacher Aides offered by Massey University, for example, is an 8-paper programme available by distance (i.e., correspondence) study.

### **Inclusive Education for SSEN**

I believe that once all of the elements of *Special Education 2000* have been implemented and have been in place for a period of consolidation, New Zealand will have one of the leading systems of inclusive education in the world. In making this claim, I recognise that mine might be a somewhat optimistic opinion, in view of my involvement as one of the 'architects' of the policy through my service on the National Advisory Committee on Special Education.

However, I do not believe that it is likely that New Zealand will become *fully* inclusive education system in the foreseeable future. I consider that it is highly likely that parental choice and professional judgements will make for the continuance of a system with a mix of inclusive education, integration and segregated settings. Just as the mix among these three options has progressively changed in the direction of inclusive education during the past century, so too is it likely to continue this trend in the coming years.

The present pattern of inclusion (regular class placement), integration (placement in a special unit, with some experiences in regular classes) and segregation (special schools<sup>2</sup>) is shown in the following two tables. Table 1 shows that 3 in every 10 students (29.2%) with very high needs and 6 of every 10 students (64.9%) with high needs receive their education in regular classes. In total, just over half of the two groups combined (56%) were educated in inclusive settings (i.e., in regular classes).

Table 1 also shows the distribution of ORS-funded students by location, according to the types of schools in which they are enrolled. Of those attending primary schools, the vast majority are placed in regular classes (2,763 out of 3,288, or 84%), whereas of those attending secondary schools, the proportion in regular classes, compared with those in special units, was almost identical (770 out of 1,580, or 49%).

Overall, of students in the ORS programme, 24% are located in special schools, 20% are in special units within regular schools and 56% are in regular classes.

**Table 1. Location of ORS-funded students by school type on 12 April 1999**

ORS Funding	Location	Special	Area	Corresp.	Primary	Secondy	TOTAL
		School	School	School	School	School	
Very High Needs	Regular Class	-	14	27	358	89	488
	Special Unit	-	-	-	210	200	410
	Special school	774	-	-	-	-	774
High Needs*	Regular Class	-	100	64	2,405	681	3,250
	Special Unit	-	3	-	315	610	928
	Special school	830	-	-	-	-	830
Total	Regular Class	0	114	91	2,763	770	3,738
	Special Unit	0	3	0	525	810	1,338
	Special school	1,604	0	0	0	0	1,604
<b>TOTAL</b>		<b>1,604</b>	<b>117</b>	<b>91</b>	<b>3,288</b>	<b>1,580</b>	<b>6,680</b>

\*includes 457 students aged 5-7 who are in the Transition Resourcing programme

Another set of data that provides some indication of the extent to which SSEN are included in regular schools concerns the distribution of such children. From Table 2, it can be seen that in 1999, 1,586 schools had at least one ORS-funded student enrolled. This means that 60% of the 2,657 schools in New Zealand have at least one student with high or very high needs. (Note that the dates for the two tables are different, thus explaining the discrepancies in the total figures.)

<sup>2</sup> Even in special schools, students have some integrated experiences with students in regular schools.

**Table 2. Distribution of ORS-funded students, by numbers of such students in different schools on 12 July 1999**

<b>Number of Eligible ORS/TRS students at a school.</b>	<b>Number of Schools with this number of ORS/TRS students</b>	<b>Total Number of ORS/TRS students</b>
1	627	627
2	357	714
3	196	588
4	116	464
5	67	335
6	36	216
7	31	217
8	24	192
9	11	99
10	8	80
11	9	99
12	10	120
13	8	104
14	5	70
15	5	75
16	6	96
17	1	17
18	7	126
19	6	114
20 or more	56	2,252
<b>TOTAL</b>	<b>1,586</b>	<b>6,605</b>

In my opinion, there is widespread support for the principle of inclusion among the community. This is reflected in the various pieces of non-discrimination legislation that have been put through Parliament in the past decade (see earlier references in this paper). They are reflected, too, in the equal employment opportunity (EEO) policies that became mandatory in the State Sector Act, 1988. Under this Act, Government departments had to ensure EEO policies for the five target groups of: Maori, women, Pacific Island people, people from ethnic minority groups and people with disabilities. This legislation is reflective of the country's long commitment to what has been referred to variously as egalitarianism, equality and equity that has permeated many facets of its life since the First Labour Government was elected in 1935. Until recently, New Zealand could be described as a 'welfare state', with wide-ranging commitments to the poor and the disadvantaged reflected in its social welfare,

health and educational systems. While the doctrine of economic rationalism noted above has made inroads into this ethos, it is nevertheless true that the principles of equity still form a strong thread in New Zealand society.

The world-wide human rights movement, as reflected in UN proclamations and declarations and in the legislation of countries such as USA, Canada, UK and Australia, has also had direct or indirect effects on New Zealand's inclusion policies.

However, support for inclusion is by no means unqualified. In recent years, blocks to inclusive education have centred on four areas:

#### *Resources*

Past surveys have suggested that while there was goodwill towards SSEN and majority support across principals, trustees and teachers for inclusion, these views were almost always expressed with qualifications. In the main, all three groups mentioned the importance of support for its successful implementation, and identified areas of funding, resourcing and staffing as critical. Problems centred on both the quantum and the distribution of special education resources. There were widespread complaints regarding the amount of funds available for special education, with consistent pressure being placed on a pool of discretionary teacher aide hours. As well, it became increasingly apparent that existing resources were inequitably spread around the country and among different categories of SSEN.

#### *Teachers' skills*

A frequent concern expressed by teachers and their unions has been a perceived lack of skills possessed by teachers to enable them to work effectively with SSEN. This concern has reflected inadequacies in teacher education and professional developments in their coverage of matters to do with teaching SSEN. It also reflects the reification of special education into something that required highly specialised training or special personal qualities in teachers.

Teachers in New Zealand primary and intermediate schools are increasingly being trained to accommodate diversity in their classrooms and principals expect them to be skilled in managing different levels of achievement in the same classroom. The diversity has long included children with moderate learning and/or behavioural difficulties, but with the *Special Education 2000* policies, increasingly students with high or very high needs are being considered. I am confident that most teachers discharge their responsibilities to the former group very well, but few have the skills to manage the latter group. While the professional development programmes now under way will increase the skill base of teachers to work with students with high and very high needs, they will continue to need more specific advice and support from agencies such as the SES if they are to develop successful programmes.

In a typical New Zealand primary or intermediate classroom, an observer will see skilled use of co-operative group work (including ability and mixed grouping) and peer tutoring.

The position in secondary schools is somewhat different – as it is in all countries with which I have had experience. Here, most teachers are subject-centred, rather than child-centred. Historically, in some areas of the country ‘Experience Classes’ have catered for students with moderate learning and behaviour difficulties. To many secondary teachers, therefore, inclusive education’s first challenge is to provide for these students before they can even contemplate students with high or very high needs.

#### *Attitudes*

While there is widespread support for the principle of inclusion (provided the first two issues can be resolved), there are still some principals and teachers who resist it. These negative views are most generally held by older teachers whose experiences of SSEN, both as students and as teachers, have been dominated by segregation and a belief in the legitimacy of a dual system of education. These deeply embedded attitudes are difficult to change, even when rights to non-discrimination are embedded in laws and regulations. Even now there are misunderstandings as to what inclusive education really means.

#### *Low profile of SSEN*

To some extent SSEN have suffered the disadvantage of being a relatively small minority whose interests can often become submerged in the complexities of school organisation and politics.

How have these blocks been addressed?

#### *Increased resources*

Under *Special Education 2000*, major changes took place in both the quantum and distribution of special education resources. The new policy was accompanied by a 40% increase in overall funding for special education, made possible by budget surpluses in the government). Several features of the funding also contributed significantly to inclusion of SSEN. Firstly, ORS funding was made ‘portable’. Whereas in the past the resourcing of students with high and very high needs was tilted heavily in favour of special school or special class placements, under *Special Education 2000* the resource went with the students, irrespective of their location, including regular classrooms. Secondly, SEG funding became available to all schools. Whereas in the past schools had to apply every six months for a discretionary special education allowance, under *Special Education 2000*, every school received a grant, the size depending on the total school roll and the school’s socio-economic status. Thirdly, in order to facilitate inclusion, a new class of teachers was created – RTLBs. These teachers are available to give guidance and support to teachers in meeting the challenges of SSEN, especially those with moderate learning and/or behaviour difficulties.

#### *Changing teachers’ skills and attitudes*

Professional development programmes that are directed at all teachers and principals over the

period 1998-2001 should go a long way towards improving the skill-base of these personnel. The work of RTLBs should also have a significant impact in the future as these positions come 'on stream'. These measures will also increase the prominence accorded to SSEN in schools.

#### *The low profile of SSEN*

Parents of SSEN have long played an important roll in shaping attitudes towards SSEN. They have done this both individually and collectively and have proved a potent force in their ability to access the media and to lobby Parliamentarians and policy analysts. Important in this regard has been the possibility of utilising a free media and accessing the democratic processes. Of relevance too, has been the role played by academics in universities and colleges of education. Drawing upon all of the above factors, but articulating them in a range of forums, academics and other writers in New Zealand have been advancing the principles of inclusion for some years.

#### **Lessons from New Zealand**

What has been learned from the New Zealand's experience in moving towards an inclusive education system? My over-riding assumption is that the success of inclusive education depends upon it being viewed as part of a system that extends from the classroom to the broader society. Its success depends on what goes on day-to-day, minute-by-minute in classrooms and school playgrounds. It depends on teachers and principals who, in turn, depend on the leadership of the educational administrators at all levels of the education system. Ultimately, it depends on the vision of legislators to pass the necessary laws and provide the appropriate resources.

The following points appear to me to be important and are worthy of consideration by policy makers in other countries:

1. Move towards a non-categorical, needs-based system of identifying and resourcing SSEN (cf., ORS).
2. Allow for special education resources to go with the student, whether they are located in a special school or in a regular class (cf., ORS).
3. Ensure that all schools receive grants to facilitate the inclusive education of SSEN who do not receive individual entitlements (cf., SEG).
4. Adopt an ecological, rather than a deficit model, so that as much attention is paid to the quality of learning environments as to the learning or behavioural difficulties manifested by students.

5. Create multi-disciplinary teams at the district level to provide advice, guidance and support to teachers of SSEN (cf., the SES).
6. Create positions of resource teachers in all schools to provide daily support to teachers of SSEN (cf., RTLBs).
7. Set up professional development programmes directed at helping all teachers and principals to create inclusive schools and classrooms (cf., the *Inclusive Schools* projects that I am co-directing).
8. Ensure that the school curriculum is inclusive in its design and delivery. This means, for example, that teachers would:
  - Ensure that activities are age appropriate and functional. Activities and equipment should be appropriate for a child's chronological age, although their individual learning objectives may be at a developmentally appropriate level. Activities should be meaningful and useful to the child.
  - Ensure that the demands of the task are within all students' ability. In setting goals for particular lessons, it is critical that these are within children's current cognitive and physical ability levels.
  - Plan for multi-level curriculum instruction. This involves teaching a diverse group of children within a shared activity in which children have different individually appropriate learning outcomes within the same curriculum area.
  - Allow for the achievement of different objectives for different children in the same lesson. This involves teaching a diverse group of children in a shared activity where the children have different and individually appropriate learning outcomes from two or more curriculum areas.
  - Adapt the curriculum for children with special needs. In an inclusive curriculum, adaptations or modifications are necessary to ensure that all children have positive learning experiences and achieve to the best of their abilities. A curricular adaptation may be considered as any adjustment or modification in the environment, instruction, or materials used for learning that enhances or allows at least partial participation in an activity.
9. Review all examination and assessment procedures to evaluate their impact on SSEN and to ensure that such students are not unfairly discriminated against by such procedures.
10. Set up clear accountability systems to ensure that schools adopt and implement inclusive policies.



11. Create an environment where parents of SSEN can become involved as true partners in decisions affecting their child's educational placement and programme.
12. Create comprehensive early intervention programmes.
13. Search for and carefully document schools that are moving in the direction of inclusive education and take steps to disseminate their experiences.
14. Establish a broadly representative advisory committee on special education, with representatives of different stakeholders, but with a brief to be innovative and to develop recommendation aimed at furthering inclusive education (c.f., the National Advisory Committee on Special Education).
15. Ensure that the interests of minority ethnic and other groups are identified and respected.
16. Ensure that pre-service teacher education programmes pay sufficient regard to the interests of SSEN in general, and to inclusive education in particular. This may mean offering professional development for the staff of teacher education institutions to ensure that they are keeping up with world trends in these areas.
17. Place an emphasis on non-categorical training for specialist teachers.
18. Review the functions of special schools, with a view to re-constituting them as resource centres for special education.
19. Ensure that the building codes of regular schools allow for the full access by SSEN, especially those with physical disabilities.
20. Make adequate provisions for transporting SSEN to their local schools.
21. Undertake extensive community education programmes to ensure the successful implementation of special education reforms.

#### **Issues and Controversies**

To conclude, approaches to the education of students with special education needs are undergoing considerable change in many countries. Special education in New Zealand (and in many other

countries, too) is the 'battleground' of competing paradigms (Mitchell, 1999, 2000). Three in particular stand out.

Firstly, there is a clash of views as to what constitutes 'special education needs'. Here, the contrast is between those who adopt a 'medical model', in which failure at school is attributed to some defect or inadequacy within the student, and those who take an 'ecological perspective,' which focuses on the failure of educational systems to take sufficient account of student diversity.

Secondly, there is a clash between those who advocate for a single, inclusive education system and those who argue for a binary system, in which there is 'regular' education' for the majority of students and 'special education' for a small minority with special needs.

The third paradigm clash is between those who wish for more local control of special education – or the converse, for more central control. A related – and very important – issue is that of accountability, particularly in a decentralised system. Prior to the introduction of *Special Education 2000* in 1995/96, special education was highly centralised, with national legislation and policies and Ministry-determined provisions. While many of the national policies that effect special education remain centrally controlled, *Special Education 2000* has the effect of decentralising some decision-making. In the context of a decentralised education system, the question arises of how far special education policies, as well as management decisions, can be devolved to the local level? There is a risk that, unless there are strong safeguards at the centre, this could result in a lack of equity and an incoherent pattern of services across the country.

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