

TERM OF BIRTH AND IDENTIFICATION OF SPECIAL  
EDUCATIONAL NEEDS BASED ON THE BRITISH  
CODE OF PRACTICE (1994):  
A STUDY AND AN INTERNSHIP REPORT

CENTRE FOR NEWFOUNDLAND STUDIES

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**Term of Birth and Identification of Special Educational Needs  
Based on the British *Code of Practice* (1994):  
A Study and an Internship Report**

By

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## ABSTRACT

This internship report documents the internship component of the Master of Education, Educational Psychology programme which was completed with the Psychology and Assessment Service in Harlow, Essex, England. The report comprises a descriptive internship placement component and a research component. The internship placement component includes a description of the West Essex Psychology and Assessment Service, a statement of the intern's goals and objectives for the placement, and a description of the internship experience. The research component presents an investigation of term of birth effects on the identification of special educational needs at Stages<sup>s</sup> 1, 2, and 3 of the *Code of Practice (1994)* Stages of Assessment. The results of this investigation indicated that a considerably higher proportion of special educational needs cases consist of summer-born rather than spring or autumn-born children. In the study, summer-born children comprised a higher proportion of each type of special educational needs category identified. The results also confirmed that a higher proportion of summer-born children identified with special educational needs are at Stage 1 of Assessment. This trend of summer-borns comprising the highest proportion of cases was not consistent across Years 3, 4, 5, and 6 of schooling.

## Table of Contents

Acknowledgements	p.i
Abstract	p.ii
<b>PART I. INTERNSHIP COMPONENT</b>	
<b>CHAPTER 1: INTERNSHIP SETTING</b>	p.2
a. Introduction	
(i) Rationale for Internship	p.2
(ii) Rationale for Harlow, Essex, England	p.3
b. Structure of the Essex Psychology and Assessment Service	p.4
c. The Code of Practice	p.6
(i). Stages of Assessment	p.7
(ii). Assessment Time Scales	p.10
d. Responsibilities of West Essex Educational Psychologists	p.13
(i). Services for preschool students	p.14
(ii). Services for school-aged children	p.15
(iii). Services for parents	p.16
(iv). Other services	p.16
e. Summary	p.18
<b>CHAPTER 2: GOALS AND OBJECTIVES</b>	
a. Introduction	p.19
b. Internship Goals and Objectives	p.20

d. Evaluation	p.26
e. Summary	p.26

### **CHAPTER 3: DESCRIPTION OF INTERNSHIP EXPERIENCE**

a. Supervision	p.27
b. Three-Tier Experiential Process	p.30
(i). Shadowing Phase	p.30
(ii). Transition Phase	p.37
(iii). Independent Phase	p.38
c. Knowledge Acquisition and Skill Development	p.44
(i). Reading and Research	p.44
(ii). Information Sessions	p.45
(iii). Visits to Special Provision Schools and Units	p.46
(iv). Consultation	p.48
(v). Informal Assessment	p.49
(vi). Formal assessment	p.50
(vii). Time Management	p.51
d. Summary	p.53

### **PART II. RESEARCH COMPONENT**

a. Introduction/Review of the Literature	p.55
b. Rationale for present study	p.66
c. Method	p.68

(I) Population sample	p.68
(ii) Procedure	p.69
d. Results	p.71
e. Discussion	p.82
f. Summary	p.86
g. Limitations	p.88
<b>REFERENCES</b>	p.91
<b>APPENDIXES</b>	
A. Internship evaluation from field supervisor	p.96
B. Materials read during internship placement	p.99
C. School Visit Summary Report	p.103
D. Research letter to Harlow schools	p.105

**PART I: INTERNSHIP COMPONENT**

## CHAPTER 1: INTERNSHIP SETTING

### **Rationale for Internship**

The Master of Educational Psychology programme at Memorial University of Newfoundland provides a combination of academic study and practical experience necessary for developing the knowledge-base and skills of a competent educational psychologist. Pre-practicum and practicum placements, of 30 and 210 hours respectively, comprise the required experiential component of the Master's programme.

The first phase of the practical component (30 hours) was completed with the Psychology Department of the Waterford hospital, St. John's, Newfoundland, under the supervision of a registered educational psychologist. This pre-practicum placement facilitated the observation of an educational psychologist in a clinical setting, and provided practice of basic counselling and assessment skills. The more extensive practicum component (210 hours) was completed with the Roman Catholic School Board in St. John's, NF. This placement presented the opportunity to observe and work with four educational psychologists within their varying roles. During this placement, focus was placed on knowledge-base development and observation and participation in consultations and formal

assessments. These were valuable experiences, unfortunately, time restraints limited the level of skill and knowledge-base development that was achievable.

The Graduate Internship Master's route presented an extended opportunity for further development of practical skills and knowledge in the field of educational psychology. The internship placement permits the unique experience of working independently as an educational psychologist with the support and guidance of experienced educational psychologists. This environment empowers the intern to take the knowledge and skills acquired during the programme's previous academic and practical components and develop them to a heightened professional level. The role of educational psychologist demands a close tie with current research within the field. It is deemed important for the profession that educational psychologists contribute to this pool of current findings (Canadian Code of Ethics, 1992). To address this role and responsibility, the internship placement is intended to provide an opportunity to undertake academic research in the area of educational psychology.

#### **Rationale for Harlow, Essex, England**

The internship component of this programme was completed with the Psychology and Assessment Service (PAS) located in Harlow, Essex, England.

This setting was chosen for several reasons. This internship placement was of a 12 week duration (January 11, 1996 to March 29, 1996) which is approximately four weeks longer than most site options in Newfoundland. Another reason for this choice was that informal assessment procedures are utilized extensively in England. Informal assessment is a crucial aspect of assessment, and an area in which the intern identified a need to further develop competence. A third reason was that the Harlow placement afforded an opportunity to study the English educational psychology system. The Harlow Psychology and Assessment Service proactively approaches the special educational needs of children through adherence to the *Code of Practice* (1994) which defines a five stage model of assessment. A fourth reason was based on research skill development; the intern hoped to pursue an investigation of the effect of term of birth on the identification of special educational needs through Stages 1, 2 and, 3 of the *Code of Practice* (1994) Stages of Assessment.

#### **STRUCTURE OF THE PSYCHOLOGY AND ASSESSMENT SERVICE**

The Essex educational system is governed by the Essex Local Education Authority (LEA) which is similar to Newfoundland's Department of Education. The Psychology and Assessment Service (PAS) is one branch of service provided

by the LEA to meet the needs of its quarter of a million clients (Kerfoot, 1995). To ensure an effective and consistent service throughout Essex County, the PAS is organized in a hierarchical governing structure. One Principal Educational Psychologist and two Assistant Principal Educational Psychologists guide and monitor service delivery for the entire county. The county is split into two divisions: North West/North East/South East Division and the Mid/South West/West Division; each is led by a Divisional Senior Educational Psychologist and a Divisional Principal Officer of Administration. Each division includes three area offices, employing 26 educational psychologists. Educational psychologists are supported at each office by administrative staff who assist in the coordination and evaluation of statutory assessments. Interoffice educational psychology support is established through two educational psychology teams comprised of educational psychologists from each office within the division and led by Senior Educational Psychologists. The Harlow PAS office is a base for eight educational psychologists (7 main grade, 1 senior); six clerical personnel who support the educational psychologists and administration staff; a Principal Area Officer of Administration, an Assistant Area Officer; and two named Local Education Authority Officers who represent the Essex LEA and liaise with parents concerning the process of statutory assessment.

## THE CODE OF PRACTICE

The *1993 Education Act* and the subsequent *Code of Practice*, developed by the British Secretary of State, and put into practice in September 1994, presented the Local Education Authority (LEA) with both a process and practical guidelines to ensure effective service provision for children with special educational needs. These guidelines are based on several fundamental principles:

- there is a continuum of special educational needs which must be addressed through a continuum of provision.
- children must be given the opportunity to reach their academic potential and therefore should have access to a “broad and balanced curriculum.”
- the needs of most pupils can be met within the mainstream, of the 20% of the population with special needs, only approximately 2% are extreme enough to require a Statement of Special Educational Needs (Webster, 1994).
- identification of special educational needs prior to compulsory school age will require intervention of the LEA.
- partnership with parents and all agencies involved in meeting the needs of the child is crucial for effective intervention (Code of Practice, 1994).

### Stages of Assessment

The *Code of Practice* (1994) guidelines for assessment are outlined in a Five Stage Model. The stages represent the continuum of assessment and intervention required to align with the continuum of special educational needs. Stages 1 to 3 illustrate the gradient of **school-based assessment**. The *National Curriculum* (1995) prescribes an individualized approach to meeting the academic needs of children and consequently provides guidelines to teachers in terms of the informal assessment of special educational needs. Stage 3 illustrates the transition point at which the educational psychologist (and other specialists) are consulted and increasingly intense assessment and intervention measures are required. The *Code of Practice* (1994) outlines the stages of assessment as follows:

Stage 1: *Class or subject teachers identify or register a child's special educational needs, and consulting the schools Special Educational Needs (SEN) Coordinator, take action. In most cases the action implemented at this stage will meet the student's needs and therefore movement to the next stage is not necessary.* Placement on this stage prescribes increased communication between the school and the home to facilitate increased understanding and support of the child's needs.

Stage 2: *The school's SEN Coordinator takes lead responsibility for*

*gathering information and for coordinating the child's special educational provision, working with the child's teachers. If a student is experiencing persistent difficulties which require considerable support arrangements, movement to stage 3 may be required.* Stage 2 is characterized by the development of an Individual Education Plan for the child which is monitored and reviewed regularly by the SEN Coordinator.

*Stage 3: Teachers and the SEN Coordinator are supported by specialists from outside of the school. A very small percentage of children may fail to progress even with the extensive support at stage 3. At this point a Stage 4 form is sent out to the school by the Administration Service on the advice of the educational psychologist. In rare and extreme cases a child may go directly onto Stage 3 or Stage 4, after consultation with the parents and the liaison educational psychologist. Only students with severe and complex needs proceed to Stage 4.*

*Stage 4: The LEA considers the need for a statutory assessment and if appropriate, make a multi-disciplinary assessment. To obtain an accurate representation detailing the child's special educational needs the statutory assessment regulations prescribe eight appendixes, or reports, to be completed; these are: parental representations, parental evidence, advice from child's parents, educational advice, medical advice, psychological advice, advice from social*

services authority, and other advice obtained by the authority (extracted from The Education [Special Educational Needs] Regulations, 1994). The inclusive report resulting from this combined information is referred to as a "Suggested Entry". The LEA is responsible for contacting all parties involved in addressing these perspectives. The educational psychologist covering the "patch" (delineated geographic area of responsibility) will be required to complete the Psychological Advice, referred to as the Appendix F portion of the Suggested Entry. This section details an extensive psychoeducational assessment of the child's needs and presents psychological advice and recommendations for meeting these needs. An educational psychologist from outside the "patch" will be required to combine all reports into the Suggested Entry and subsequently assess the need for proposing a Statement of Special Educational Needs. The Statement is a legal document the presenting the most extensive and formal intervention plan provided for within the *Code of Practice (1994)*.

***Stage 5:** The LEA consider the need for a Statement of special educational needs and if appropriate, make a statement and arrange, monitor and review provision.*

Each successive stage involves an increasing amount of support and assessment of needs. The decision to move from one stage to the next is based on

a number of specified criteria identified at each stage. Some students may remain on one assessment stage for a long period of time whereas others may return to a previous stage as they begin to require considerably less and less support. A Statemented child will not necessarily maintain the Statement for his or her school career. If sufficient progress is made, the Statement may be ceased and the child may revert back down through the stages.

#### **Assessment Time Scales**

The intern's understanding of the time scales prescribed by the *Code of Practice* for stages of assessment was deepened through an interview with West Essex Local Education Authority (LEA) officers, Angela Shaw and Valerie Whitehouse.

When an assessment of special educational needs is required, the initial request is directed to the LEA officers. This request tends to be put forth by the school after they have worked through Stages 1 to 3 and decide additional assistance is required to meet the needs of the child. Often contact is made directly by the parents prior to the school's input with regards to Stages 1 to 3. The LEA officers advise parents of their right to make a formal request for assessment under Section 173 of the *1993 Education Act*. However, parents are

encouraged to consult with the school in regards to the initial Stage 1 to 3 process. All requests go through an Initiation Panel that is comprised of the Senior Educational Psychologist, Principal Area Officer (PAO), a representative from Special Needs Support Services (SNSS), and an educational psychologist. This panel of experts evaluates whether there is adequate evidence to support an assessment. Ninety-eight percent of formal requests for assessment without proper adherence to the *Code of Practice* guidelines are declined due to insufficient information.

If the Initiation Panel accepts the request for assessment, an intricate process ensues. The LEA writes to the parents to inform them of the decision to initiate an assessment and provides them with information on the assessment process. The LEA also informs the school, Psychology and Assessment Service, Child Development Centre, and Department of Social Services of their responsibility to submit reports concerning the said child if it is agreed that an assessment is necessary. Parents have 29 days in which to respond to this information. The decision must be made as to whether it is necessary to assess by day 42, as defined within Essex County Guidelines. By day 42, if the decision is YES, the LEA requests reports from all agencies involved. Reports from those requested must be submitted within 6 weeks from the date of notice. When all

reports have been submitted they are combined in an extensive report referred to as the Suggested Entry. This process is completed by an educational psychologist from outside the respective "patch" to ensure objectivity in analysing the evidence. If after analysing the assessment results the educational psychologist decides that a Statement of Special Educational Needs is not necessary, a 'note in lieu' is issued and forwarded to both the parents and the school. This note presents information concerning the child's needs and how he or she may be best assisted to meet his or her potential.

If the results indicate that a Statement is necessary, the Suggested Entry is submitted as a "proposed Statement" to the PAO who approves, or disapproves it. If approved, the PAO makes a recommendation with regard to the resources that will be required to meet the needs identified in the proposed Statement. The PAO and the educational psychologist writing the Suggested Entry, independently identify/make "banding". Banding refers to the amount of resources required from the LEA to meet the specified needs of the child to be statemented. Each band indicates the amount of assistance (i.e., 10 hours of TA) and financing needed. The information is then forwarded to the Case Management Panel who approves allocation of resources. At this time, the proposed Statement and all information received from involved agencies is sent to parents. Parents have 15

days to present their concerns or queries to the L.E.A. Within eight weeks the proposal is substantiated and becomes a legal document referred to as a Statement of Special Educational Needs. This document legally binds the L.E.A to provide all the essential support and services outlined therein. During the period of substantiation the parents may discuss their concerns with the Named L.E.A officer. If parents do not agree with the decisions made concerning the case, they have two months after the case has been substantiated to appeal to the Tribunal.

## **RESPONSIBILITIES OF WEST ESSEX EDUCATIONAL PSYCHOLOGIST**

Educational Psychologists in Essex are each assigned a geographical “patch” and are responsible for providing a wide range of psychoeducational services to those residing within that patch. This includes services to young people from 0 to 19 years of age, their parents, the school personnel, all other professionals who work within the realm of special educational needs, and other relevant educational psychology services delineated by the L.E.A. These responsibilities are clearly defined within the PAS Guidelines on Policy and Practice (June 1995).

**Services for Preschool Children (0-5 years)**

Preschool children presenting possible special educational needs are identified by the Local Health Authority and referred to the PAS, under Section 176 of the *1993 Education Act*. The Local Health Authority submits a formal notification of concern for a particular child and forwards it to the educational psychologist responsible for the geographical area in which the child resides. Parental requests to the LEA may also result in an educational psychologist's involvement if information presented illustrates special concerns. Educational psychologists are then responsible for assessing the type and intensity of special educational need presented by the child.

Parents are forwarded a questionnaire to complete which provides the educational psychologist with information on the child's development and level of functioning. This information gives the educational psychologist better insight into the level of difficulty or delay experienced by the child, allowing him/her to organize a subsequent home visit which may include various informal assessment activities. Through consultation with the child's parents, and findings from an assessment, the educational psychologist may (with the parents consent) liaise with other agencies involved in the care of preschool children with special educational needs, such as the Special Needs Support Services, District Health

Authority, and Social Services. This may result in the child receiving specific assistance within the home and/or within a special provision preschool/playgroup. The educational psychologist is also responsible for providing psychoeducational advice to these agencies, as well as to the parents. Only approximately 2% of children assessed under section 176 go on to be Statemented at a later point.

#### **Services for School-Age Pupils (5 - 19 years)**

The educational psychologist is responsible for providing consultation services to the personnel of both mainstream and special provision schools with regard to special educational needs students. Educational psychologists are responsible for monitoring the progress of pupils who present difficulties and to provide advice to school personnel when the initiation of a formal assessment is deemed appropriate. When the initiation panel has approved referrals for statutory assessments, educational psychologists must complete extensive psychoeducational assessments and identify the necessary provisions to meet the specified needs of the child. The educational psychologist is then responsible for monitoring and evaluating the effectiveness of the assistance provided by the school. Educational psychologists also monitor the progress and provision for students with Statements of Special Educational Needs and complete

reassessments when the appropriateness of the Statement is questioned.

### **Services for Parents**

The *1993 Education Act* prescribed a more active role for parents within the process of their child's assessment; this became a fundamental principle guiding the *Code of Practice (1994)*. As participants in this process, it is crucial that parents be presented with information concerning their child's assessment in a clear jargon-free manner and supported with regards to their concerns. It is part of the educational psychologist's responsibility to meet these goals related to understanding. In terms of securing an effective assessment and provision *the knowledge, views and experience of parents are vital (Code of Practice, 1994, p.2)*; therefore, a partnership with parents is necessary. The Parent Partnerships Scheme was created by the Essex Psychology and Assessment Service to address this need by bringing together educational psychologists and parents of children with special educational needs to enable the discussion of the various issues surrounding assessment.

### **Other Services**

Essex educational psychologists are responsible for input in a variety of

other services that assist in the effectiveness of the PAS within Essex County. The LEA depends on educational psychologists to present their psychological expertise in the form of in-services with school personnel on issues of importance, and for supporting school personnel through involvement in "cluster" meetings (discussion of special educational needs issues with the SEN Coordinators and Head teachers from a cluster of schools) and school improvement initiatives. Educational psychologists are supported in their efforts to contribute to the development of the Educational Psychology Service (EPS) as part of their own professional development and are expected to contribute their expertise to the Department of Education and PAS as required. For example, one educational psychologist's knowledge of stress management was identified as appropriate to address an area of need of school administration personnel. Therefore, time was allotted within his schedule to provide in-servicing to Essex Head teachers. Essex educational psychologists are also encouraged to consult and coordinate with other PAS staff and Special Needs Support Services (SNSS) to ensure the most effective system of special educational needs services is provided.

The governing PAS presents educational psychologists with a time allotment breakdown for each responsibility. This assists in efficient scheduling to ensure that each responsibility is adequately met.

## SUMMARY

The setting of Harlow, Essex, England presented the opportunity to work with a proactive Psychology and Assessment Service (PAS). The responsibilities of the PAS is clearly defined within the *1993 Education Act* and the subsequent *Code of Practice (1994)*. The *Code of Practice (1994)* presents the PAS with guidelines for appropriate intervention within the schools through a Five Stage Model of Assessment. It also presents clear time-lines for each phase of the statutory assessment process to ensure efficiency. Essex educational psychologists are responsible for providing a range of services to preschool children, school age children (in both mainstream and special provision schools), and parents of children with special educational needs. As well, they must provide other services to the county which involve the sharing and development of expertise. The hierarchical organization of the PAS ensures the efficient coordination and delivery of these services.

## CHAPTER 2: GOALS AND OBJECTIVES

To ensure an appropriate placement for the intern, the Essex PAS required the submission of a list of the intern's strengths and weaknesses, as well as a list of goals and objectives. The goals were developed after consideration of the skills and knowledge-base necessary to be a competent Educational Psychologist; and the intern's personal strengths and areas of need with respect to these competencies. Specific objectives were identified following consultation with colleagues who had previously worked in the Essex PAS system and could provide insight into what would be possible to achieve in this setting. The proposed internship goals and objectives were discussed and evaluated with the supervising educational psychologists at the beginning of the placement, at midterm, and prior to completion of the placement. These discussions, in addition to increasing the intern's knowledge and understanding of the Essex system, facilitated the evolution of more applicable goals and objectives. The specific internship goals and objectives provided the structure and guidelines necessary to ensure the further development of a broad knowledge-base and the skills necessary for the intern to become a competent and independent educational psychologist.

**INTERNSHIP GOALS AND OBJECTIVES**

Goal #1: To further develop the skills and knowledge-base necessary for the role of an educational psychologist. [This goal encompasses all following goals and objectives]

*Objectives:*

1. Shadow supervising educational psychologists for 2 weeks.
2. Consult regularly with supervising educational psychologists concerning the educational psychologist role.
3. Assume a case-load representative of that of an Essex educational psychologist.
4. Obtain pertinent information and/or references concerning the crucial issues encountered by an educational psychologist.
5. Attend pertinent conferences and/or in-services.

Goal #2: To increase knowledge and understanding of the various disabilities, and learning difficulties encountered by an Essex educational psychologist.

*Objectives:*

1. Shadow supervising educational psychologists in their assessment within various areas of concern. Discuss observed cases with supervising

educational psychologists.

2. Observe and evaluate service delivery of special provision units and schools. This would include the following:

- Moderate Learning Difficulty School
- Emotional Behavioral Difficulty Residential School
- Speech and Language Unit
- Hearing Impaired Unit
- Physical Disability Nursery

3. Obtain up-to-date information and/or references relative to areas of difficulty.

4. Assume an individual case-load representative of the various difficulties encountered by an Essex educational psychologist.

Goal #3: To further develop skills in consultation.

*Objectives:*

1. Observe supervising educational psychologists in consultation with school personnel, parents, and relevant outside agencies.
2. Assist supervising educational psychologists in consultation with school personnel and parents.

3. Consult with school personnel, parents and relevant outside agencies.

Goal #4: To increase knowledge and skills of informal assessment.

*Objectives:*

1. Observe supervising educational psychologist utilizing various forms of informal assessment. Discuss procedures utilized following observation.
2. Utilize informal assessment procedures in cases, as needed.

Goal #5: To gain experience in the administration and interpretation of formal assessment instruments used in Essex.

*Objectives:*

1. Observe supervising educational psychologists in their utilization of formal assessment instruments frequently used in Essex. Consult with educational psychologists concerning the purpose of psychometric tests employed and the interpretation of results.
2. Examine psychometric test manuals.
3. Administer tests, as needed, and interpret results.

Goal #6: To further develop the skill of determining most appropriate assessment

strategies for specific areas of difficulty.

*Objectives:*

1. Discuss with the supervising educational psychologist choices concerning assessment procedures, interpretation of results, and recommendations with respect to observed cases.
2. Assume a case-load covering the various areas of learning difficulty encountered by an Essex educational psychologist. This would include:
  - General learning difficulties
  - Specific learning difficulties
    - Literacy difficulties
    - Maths difficulties
  - Autism continuum (including Aspergers Syndrome)
  - Speech and Language difficulties
  - Emotional/Behavioral difficulties

Goal #7: To further develop skills and knowledge necessary for consultation, assessment and intervention with respect to the wide age-range covered by the Essex Psychology and Assessment Service. To focus primarily on preschool and primary school-age children (i.e., 2-11 years of age).

*Objectives:*

1. Observe supervising educational psychologists with respect to consultation, assessment and intervention across the age levels serviced by the Essex PAS. Discuss variation in procedure with respect to age and developmental level.
2. Complete independent consultations and assessments at the preschool and primary education age levels.
3. Obtain relevant information with regards to assessing primary aged students.

Goal #8: To increase confidence and independence as an educational psychologist.

*Objectives:*

1. Assume a case-load of no less than 10 cases which shall include:
  - a) the range of difficulties encountered by supervising educational psychologists
  - b) the age-range of students covered by supervising educational psychologists
  - c) consultation with school personnel and parents

- d) informal assessment procedures
- e) formal assessment procedures
- f) report writing (i.e., visit summaries, psychological reports, psychological advice, etc)

2. Consult with the supervising educational psychologist (1 hour minimum) to discuss choices in assessment strategies, interpretation of results, recommendations, and inclusion of outside agencies.

Goal #9: Pursue research component of internship

*Objectives:*

1. Undertake a literature review of past research completed on the significance of term of birth on the identification of special educational needs.
2. Identify four Harlow primary schools which would constitute a population of approximately 700 students, and request access to the Special Educational Needs files.
3. Research the effect of term of birth on the identification of special educational needs on Stages 1, 2 and 3, of the *Code of Practice (1994)* Stages of Assessment for children in Years 3, 4, 5, and 6 of schooling.

## **EVALUATION**

Evaluation of the intern's performance with respect to effectively meeting the above objectives was accomplished through several means. Three formal meetings, and frequent informal meetings, were arranged throughout the term between the intern and supervising educational psychologists to discuss progress toward goals and objectives (i.e., Are they being met? How can they be met more effectively?). Daily consultation occurred with a supervising educational psychologist to discuss the intern's planned and initiated case involvement. The supervising educational psychologists evaluated and provided feedback to the intern on each written report/visit summary, as well as other correspondence, prior to distribution of this information to the school. The intern consistently evaluated personal performance through the tangible feedback provided by daily log entries, analysis of time management, efficiency in report writing, input from school personnel, and ongoing increased feelings of competence. Upon completion of the internship placement, the intern was presented with a written evaluation of performance from field supervisors (see Appendix A).

## **SUMMARY**

Goals for the internship were created following an investigation of the

knowledge and skills required to be a competent and effective educational psychologist, and through reflection on personal strengths and deficit areas. Specific objectives were developed after acquiring information about the placement setting with regard to possible activities available to help achieve the internship goals. Evaluation of the fulfilment of the objectives was analysed through several internal and external means to effectively monitor development.

### **CHAPTER 3: DESCRIPTION OF INTERNSHIP EXPERIENCE**

#### **SUPERVISION**

Supervision was provided by two educational psychologists, Jill Tresadern and Anthony Murphy, with Ms. Tresadern assuming a greater percentage of supervisory duties. The supervisory responsibilities of Ms. Tresadern and Mr. Murphy transitioned from that of teacher/mentor at the initial stage of the placement, towards that of consultant by the end of the placement. Meetings with one of the supervising educational psychologists were held on a daily basis for the purpose of case conferencing; this included, consulting on the most appropriate assessment strategies for specific areas of special educational needs, discussing results of assessments, and providing evaluation and feedback on reports written

by the intern. This supervision enabled the intern to develop knowledge and skills with respect to professional practices related to assessment. It also provided an opportunity to observe and evaluate two very different styles and philosophies with respect to the educational psychologist's role. The views and philosophies of both supervising educational psychologists emerged both formally and informally during the internship.

Ms. Tresadern is relatively new to the field of educational psychology. She has been employed as an educational psychologist for approximately four years. She perceives her responsibilities as being shared evenly between children with special educational needs and the adults who work with them. Ms. Tresadern describes her role as that of an individual who listens, empathizes, clarifies, gathers information, and problem solves. Ms. Tresadern summarized her style and philosophy in the following statement: "It is important to gain a picture of where the child is 'at', what the learning environment is like, the interplay between the child and adults involved, and the interplay between the involved adults. This information gives a much broader perspective of how a child can achieve than any information that can be gathered from a mere number or a test score".

Mr Murphy has been employed as an educational psychologist for 20

years. During this time he has held a number of different positions: educational psychologist, Senior Educational Psychologist, Principal Educational Psychologist, and psychologist in private practice. Mr. Murphy has a background in counselling and psychoanalysis and prefers a more formal style in his role. Mr. Murphy chooses to operate as a psychologist rather than as a "super teacher". The teacher holds an important area of expertise in the life of the child and Mr. Murphy feels that if the psychologist is to make a contribution in the school, it must be in an area which will not overlap with that of the teachers. For example, the psychologist might focus on the *Code of Practice* Stages of Assessment or standardized testing rather than on tuition advice. According to Mr. Murphy, "It may be best if the psychologist regards the teacher as a client rather than a colleague. The psychologist's role upon visiting the school is to interact with the teacher not the child, as the child would not really be made available to the psychologist's influence".

The experience of these different styles and philosophies empowered the intern to develop her own independent style which best reflects her personal philosophy of educational psychology.

### **THREE-TIER EXPERIENTIAL PROCESS**

The aim of the internship placement was to develop the professional skills and the extensive knowledge-base needed to be a competent practitioner of educational psychology. The internship placement was organized to present a sequential three-phase experiential process in which the intern (1) observed experienced professionals in the various roles of an Essex Educational Psychologist (shadowing phase); (2) modelled these roles with the guidance and constructive feedback of the supervising school psychologists (transitional phase); and (3) finally, after acquiring the skills and knowledge-base required, developed a level of self-awareness as a school psychologist that enabled the intern to work independently, further developing confidence and competence.

#### **Shadowing Phase**

Although the intern had previous experience in the role of an educational psychologist, through a practicum within the Newfoundland educational system, the Essex Psychology and Assessment Service experience presented a number of major differences. The Canadian Code of Ethics states that psychologists must *acquire an adequate knowledge of the culture, social structure, and customs of a community before beginning any major work there (IV.13, 1991)*. Accordingly, a

copy of The Code of Practice (1994), developed in Great Britain, had been acquired and read prior to the Essex internship placement. However, to consolidate this information, it was important to observe the Code in actual practice. Establishment of a two week shadowing period was therefore deemed necessary to orientate the intern to the British system, the Essex Educational Psychology Service, and the daily roles and responsibilities of an educational psychologist in Essex.

The shadowing period commenced on the first day of the placement, January 1, 1996. An agenda was arranged between the two supervising educational psychologists and the intern to ensure observation of various cases which sampled the range of age and areas of difficulty typical of an Essex educational psychologist's case-load. During the two weeks which ensued, the intern was exposed to the educational psychologist's role in statutory assessment as outlined in the *Code of Practice* (1994). Statutory assessment involves the utilization of various informal and formal assessment strategies to define a child's special educational needs and the special educational provisions required. It also includes Annual Review meetings with the SEN Coordinators and/or Head teachers, parents, and any other relevant agencies (eg., Social Services, Speech Therapy, Local Health Authority) for yearly reviews of the progress and provision

for Statemented children. Review meetings for Statemented students reaching the age of 14 years are referred to as Transition Plan meetings due to their focus on the student's progress and provision with respect to the transition from school at age 16 (i.e., to college). If the information gathered indicates a need for additional assistance, such as behaviour management or speech therapy, the educational psychologist consults with or makes formal requests to the relevant agencies.

Essex educational psychologists fulfil many responsibilities to the school which are not outlined within statutory assessment. The intern observed the supervising educational psychologists function as effective consultants and information gatherers during numerous school visits. Although the educational psychologist does not initiate a formal assessment prior to a child's Stage 3 placement, school visits typically involve requests for the educational psychologist's expertise on a number of children from pre-Stage 1 to Stage 3. Special Educational Needs Coordinators and/or Head teachers often consult with the educational psychologist concerning cases in which they require some direction or psychological advice. For children on the initial stages of assessment who present mild difficulties, consultation with class teacher and SEN Coordinator and/or Head teacher is typically all that is required.

For children on Stage 3, or those presenting more complex difficulties, consultation is usually followed by classroom observation, informal assessment and, if necessary, some formal assessment. Informal assessment generally begins with a sharing of the child's work completed in class (eg., math sums, spelling, drawings) and continues with activities focusing on the specific area of concern (eg., reading from class texts, auditory discrimination). Formal assessment at this level typically involved several subtests from a cognitive abilities test such as the British Abilities Scales, or an achievement test such as the Macmillan New Reading Analysis.

Following these information gathering sessions, the educational psychologist would return to consult with the class teacher, SEN Coordinator and/or Head teacher, and other relevant parties. Consultation would focus on the results of the assessment and would generate problem-solving with the school personnel to elicit appropriate action. As illustrated in Table 1.1, the intern was presented with the opportunity to observe various interventions by the supervising educational psychologists within cases covering a wide range of ages and areas of special educational needs.

Following each school visit, time was allotted for the intern and educational psychologist to discuss various aspects of the cases observed. This

included a discussion of the effectiveness of the consultation, the rationale for choice of specific formal and/or informal assessment procedures, the interpretation of the information gathered, and presentation of the rationale behind recommendations and/or psychological advice offered. The majority of the school visits involved primary schools with children 5 to 11 years of age. This generated much discussion surrounding issues related to age and developmental level.

**TABLE 1.1**

Age and Difficulty presented by Pupil, and Intervention of Supervising Educational Psychologist\*

<b>Age</b>	<b>Difficulty</b>	<b>Intervention</b>
2	Myotonic Dystrophy, Pervasive Developmental Delay	home visit, observation, informal assessment of physical development (eg., playing with toys, physical reactions)
4	Obsessive behavior	observation, consultation/ problem-solving with nursery teacher
5	Emotional difficulty, separation anxiety	classroom observation, consultation with Class teacher (CT)

(table continues)

<b>Age</b>	<b>Difficulty</b>	<b>Intervention</b>
5	Severe speech and language difficulties, special provision	informal: Language Action Cards, interaction with play activities, knowledge of sign language
5	Degenerative Muscle disorder	observation, consultation/problem-solving with CT and Special Educational Needs Coordinator (SENCO)
7	Speech and language (Stage 3)	formal assessment: British Ability Scales (BAS)
7	Literacy difficulties	consultation with CT regarding Stage placement
8	Behavior difficulties	observation, consultation re: stage
8	Poor academic output, inappropriate behavior	consultation with Head teacher (HT) and SENCO re: stages
8	Literacy	informal: school work sharing, high frequency words, letters, self esteem scale; formal: British Ability Scales, Vernon's Graded Spelling Test (VGST)
11	Social/Emotional Problems, reading difficulty	informal assessment: school work sharing, spelling; formal assessment: New Reading Analysis, Annual review
8	Autistic-like behaviours, little speech, poor comprehension	formal: McCarthy Scales
10	Overall literacy difficulties	informal: school work sharing, letter, high frequency words; formal: Macmillan New Reading Analysis, BAS Word Reading and Basic Number Skills, VGST

(table continues)

<b>Age</b>	<b>Difficulty</b>	<b>Intervention</b>
8	Overall academic difficulties	consultation with CT, observation, informal: school work sharing, high frequency words; formal: BAS Word Reading and Basic Number Skills
8	Speech/language and literacy difficulties	consultation with CT; informal: high frequency words, writing name and numbers, precision teaching; formal: British Picture Vocabulary Scale, BAS Word Reading
10	Apparent low cognitive functioning	consultation with CT
10	Aspergers Syndrome	Annual Review meeting
11	Obsessive behavior	observation, consultation with class teacher and SENCO
11	Violent outbursts and academic difficulties	consultation with HT and mother re: placing on Stage
11	Extreme behavior difficulties, general learning difficulties	consultation with CT and SENCO
14	Aggressive/obsessive behavior, lacking social skills	transition plan meeting
14	Behavior difficulties	consultation with CT
14	Short-term memory weakness, literacy difficulties	transition plan meeting

\* Cases observed by the intern during the shadowing/orientation phase of the internship.

**Transition Phase**

The transition phase allowed a smooth movement from observing supervising educational psychologists to completing assessment independently. This period technically began at the first day of the observation phase and increased gradually. From the outset of the placement the intern was given the opportunity to contribute relevant information in consultation situations involving school personnel and parents.

During this phase the intern was given the opportunity to assist the supervising educational psychologists in a number of different cases. Prior to each school visit the intern read the educational psychologist's file on the child and discussed the case with the educational psychologist. During the visit the intern was given the opportunity to complete selected aspects of the assessment. For example, at a transition plan meeting for a child with severe behavior problems, the intern was permitted to discuss with the child's mother, social worker and teaching assistant (TA) what changes would be necessary to facilitate the child's success. The intern assisted in the assessment of a 5-year-old with behavior difficulties through classroom observation, consultation with the class teacher, completion of a behavior checklist and a School Visit Report Summary. During this period the intern assisted a supervising educational psychologist in a

home visit regarding a 2-year-old child with myotonic dystrophy. The intern helped to gather information through observation of the child and interviewing the mother. A later follow-up visit was completed by the intern independently. The intern combined all the information, including the information gathered by the supervising educational psychologist, and completed a Section 176 report. This assessment report for “under fives” focuses on self-help skills, play and social skills, physical skills, communications skills, long-term objectives, short-term objectives, and recommendations for facilitating development in identified areas of need (extracted from Pre-School Assessment Schedule guidelines, 1995). This transitional phase enabled a gradient of interaction between the intern and supervising educational psychologists as colleagues and co-leaders of assessment.

### **Independent Phase**

During the independent period the intern accepted responsibilities similar to those of an Essex educational psychologist. Support and guidance from supervising educational psychologists was still easily accessible. Regular informal meetings took place with a supervising educational psychologist, when needed, for the purpose of discussing choices in assessment strategies, interpretation of results, and other possible areas of concern.

As well, discussion took place between the intern and supervising educational psychologists to reflect on the internship goals and objectives for the purpose of choosing a range of cases broad enough to meet the needs of the intern. Due to the intern's greater level of experience with secondary aged pupils and formal assessment, to vary the experience, the majority of cases selected for the internship were at the preschool and primary age levels (i.e., 2 - 11 years). Case-load development was arranged such that the intern began her first independent assessment during the third week of the placement and gradually assumed additional cases as the placement proceeded. The total case-load, approximately 15 cases, is described in Table 1.2, in terms of the age, area of difficulty, and program initiatives prescribed by the intern. The caseload presented a continuum of age and range of difficulty requiring a continuum of intervention.

The case of the 16 year old attending the Pupil Referral Unit as a result of behavior problems within his mainstream school was initiated following a visit to the special provision unit. Discussion with the Head teacher with respect to the unit evolved into a consultation concerning this student. The Head teacher informed the intern that the pupil's parents and teachers perceived him as very articulate and therefore held high expectations for him academically. The Head teacher, however, was concerned that the pupil performed above his chronological

age in terms of reading but performed very poorly with respect to mathematics. This performance had been previously attributed to the pupil's poor motivation. The intern administered a formal assessment of the student's cognitive abilities and his achievement levels in math and reading. An informal interview and Cognitive/Behavioral Pupil Questionnaire were also completed to gain insight into the pupil's perspective. Results of the assessment presented a picture of a student with above average intelligence and a specific learning difficulty in mathematics. Informal information gathered from the pupil indicated great confusion and frustration surrounding the issue. Consequently, the results and recommendations were discussed with the student. This was followed by individual consultations with the parent, the math instructor, the Head teacher and with personnel from the mainstream school.

Illustrating the other end of the case-load continuum was the case of a 4-year-old diagnosed as having autism, who required an assessment for the purpose of completing an Appendix F (psychological advice) portion of the Suggested Entry in order to present evidence for a special educational needs provision upon reaching school age. This child illustrated a pervasive developmental delay, total lack of speech, and would become extremely distressed from any imposed interaction. Information gathering from the child was restricted to very informal

assessment strategies. The intern chose to engage in extensive observation of the child during various structured and unstructured activities, within different settings. The intern also had the opportunity to observe the child's behavior in the presence of different people (i.e., nursery nurse, substitute nursery teacher, other autistic children, Down's Syndrome children, and children with moderate learning difficulties). Interviewing nursery personnel and the child's parents was also important in determining an accurate picture of the child's level of special educational needs. Following the assessment, the intern met with the parents to discuss the *Code of Practice* stages of assessment and the information presented in the report.

This varied case-load (illustrated by the sample cases presented above) provided the intern with invaluable experience in terms of developing a knowledge-base of special educational needs and assessment strategies; developing the skills of consultation, assessment (both formal and informal), and report writing; and integrating this information to increase understanding of the relevance of specific assessment strategies for specific age and disability groups.

**TABLE 1.2**

The Intern's Independent Caseload: the age of pupil, the difficulty presented, and the intervention pursued.

<b>Age</b>	<b>Difficulty</b>	<b>Intervention</b>
4	Autism, Pervasive Developmental Disorder	extensive observation; interviewed nursery nurse, nursery teacher and parents. <sup>a</sup>
5	Incontinence, poor behavior	consultation with CT, SENCO, Head teacher (HT) <sup>a</sup>
5	writing difficulties	consultation with Class teacher(CT), psychological advice <sup>a</sup>
5	Speech and language difficulties	interviewed nursery nurse, TA; follow-up with teacher <sup>a</sup>
6	Speech/language and literacy difficulties	informal: observation, interaction in the classroom, class text reading, alphabet names and sounds. <sup>a</sup>
6	Overall poor academic performance	interview parent, informal assessment: school work sharing, alphabet names and sounds, high frequency words; formal assessment: WISC-III <sup>UK</sup> <sup>b</sup>
7	Overall poor academics, speech/language difficulties	informal: school work sharing, high frequency words, counting, alphabet names and sounds; formal: British Ability Scales(BAS) Word Reading, Vernon's Graded Spelling Test(VGST) <sup>b</sup>
7	Behavior difficulties	interview HT, CT, TA, student; informal: observation, drawing; formal: BAS(complete), Neale Analysis of Reading, VGST <sup>b</sup>

(table continues)

Age	Difficulty	Intervention
8	Literacy	interview CT; informal: high frequency words, class target words; formal: WISC-III <sup>F</sup> * <sup>a</sup>
8	Poor literacy skills	informal: school work sharing, auditory discrimination, high frequency words, alphabet names and sounds, short-term memory; formal: BAS Word Reading, British Picture Vocabulary Scale(BVPS), VGST <sup>a</sup>
9	Speech/language and literacy difficulties; English as a second language	interviewed CT, TA and student; informal: alphabet letter names and sounds, high frequency words, auditory discrimination, Language Action Cards, self-esteem scale; formal: BAS Word Reading and Basic Number Skills <sup>a</sup>
14	Literacy difficulties	informal: interview student, auditory discrimination, self-esteem Scale; formal: WISC-III <sup>F</sup> *, VGST <sup>a</sup>
14	Literacy and visual motor difficulties	special referral for special extra time allowance during examinations, interview student; formal: BAS
16	Not reaching academic potential, behavioral difficulties (EBD special provision)	interview HT, informal: observation, Cognitive/Behavioral Assessment Pupil Questionnaire; formal: WISC-III <sup>F</sup> *, BAS Word Reading, BAS Basic Number Skills; follow-up consultations with student, parent, CT, HT, and new mainstream school.

NOTE: subscripts refer to type of report written, <sup>a</sup> refers to Visit Report Summary, <sup>b</sup> refers to a psychological report, <sup>c</sup> refers to an APPENDIX F.

## **KNOWLEDGE DEVELOPMENT AND SKILL ACQUISITION**

The role of educational psychologist is very demanding and it is therefore crucial to develop and maintain a high level of competence with respect to knowledge and skill. According to the Canadian Code of Ethics, psychologists *must keep themselves up to date with relevant knowledge, research methods, and techniques, through the reading of relevant literature, peer consultation, and continuing education activities (II.9, 1991).*

### **Reading and Research**

Developing a knowledge-base from which to draw pertinent information for each case is very important in terms of both efficiency and competence. It is important to acquire current information on the various areas covered by an educational psychologist's role. This includes, but is not restricted to, the difficulties and disabilities referred to an educational psychologist and the range of assessment/intervention procedures utilized. During the Essex experience the intern obtained current information and references on numerous areas deemed relevant to the field of educational psychology: Autism, Aspergers Syndrome, Attention Deficit Hyperactivity Disorder, speech and language development, behavior management, child development, writing skills development, social

skills training, formal assessment tools (i.e., WISC-III<sup>TM</sup>, Neale Analysis of Reading, British Ability Scale), effective report writing, Rational Emotive Counselling Therapy, stress management, and critical incident stress debriefing (see Appendix B).

### **Information Sessions**

Throughout the placement the intern was presented with the opportunity to participate in various information sessions. Each reflected an area of expertise or research of the educational psychologist(s) who led the session. Information sessions on Rational Emotive Therapy and reading research findings were presented to educational psychologists, during team and County EPS meetings, to assist in their professional development. Several institutes (series of sessions) were developed to meet the identified needs of specific groups outside the Psychology and Assessment Service. These included a Conflict Resolution institute for Head teachers, a Stress Management institute for Deputy Head teachers, and a Parent Partnerships institute which focused on developing a close partnership between parents of special educational needs children and educational psychologists. The intern provided some input to the Stress Management sessions and was invited to engage the Parent Partnership group in an initial warm-up

activity.

### **Visiting Special Provision Schools and Units**

The Local Educational Authority supports numerous special provision schools and units for children whose needs cannot be adequately met within the mainstream system. These schools and units vary in terms of the facilities and areas of expertise available. Essex educational psychologists must be knowledgeable concerning the uniqueness of each special provision setting to ensure the best placement for children with special educational needs. The intern visited a range of these special provision schools and units for the purpose of observing and evaluating the facilities and the unique programs associated with each. Separate schools or school units catering to children with specific difficulties allows for more resources and program focus to be placed on the shared areas of difficulty. Observing effective programmes within these settings produced greater insight into the needs of these children. The intern utilized this knowledge while working within these special provision settings and was also able to transfer this knowledge to assist in mainstream cases as well.

The following special provisions were visited:

- Broadfields Nursery- a speech and language nursery assisting preschool

children with communication disorders (i.e., autism);

- Maunds Wood Nursery- a nursery unit catering to both preschool children who have physical handicaps and those who are non-disabled to encourage appropriate social development;
- Mencap Nursery (Sam's Place)- a nursery for children with moderate to severe learning and communication difficulties;
- Tanys Dell Hearing Impaired Unit- primary school unit focusing on speech imitation for students with hearing impairments;
- Harlowbury Speech and Language Unit- primary school unit for students with speech and language difficulties, this unit focuses on MAKATON sign language;
- Mead School- a special primary school for students with moderate learning difficulties. This school presently caters to students with autism, Down's Syndrome, moderate learning difficulties, and severe learning difficulties;
- Wells Park Residential School- a residential school providing 24 hour support and structure for pupils (up to year 6) manifesting emotional and/or behavioral difficulties unmanageable in the mainstream school;
- Pupil Referral Unit- a unit providing temporary assistance (2 terms) for secondary students aged 12-14 years who illustrate behavior difficulties no longer manageable in the mainstream.

### **Consultation**

The Psychology and Assessment Service lends itself to a two-pronged approach to consultation. Consultation is an important aspect of service delivery to school personnel, parents, and other agencies working together to assist children with special educational needs. As well, consultation with colleagues and peers enables the sharing of expertise and knowledge which assist individual educational psychologists in gaining further insight into their assigned cases. Both areas of consultation skills were a focus during the internship. Initially, consultation practices carried out by the supervising educational psychologist were observed and the intern quickly became aware of the important role of consultation in school visits. During school visits initial meetings were held with the SENCO and/or Head teacher for the purpose of obtaining up-to-date information about the children to be assessed (either formally or informally). Following information gathering with the child, further consultation ensued in which the educational psychologist shared information with the relevant school personnel and jointly discussed the best plan of action.

Consultation with the supervising educational psychologists occurred frequently during the internship placement to discuss the British education system, specific cases, specific areas of difficulty, possible assessment strategies,

interpretations of assessments, possible recommendations, report writing, and program development. These interactions fostered a deeper understanding on the part of the intern of specific issues, and assisted in the development of a personal problem-solving approach. Consultation also took place between the intern and two University of East London educational psychology interns. This provided the intern with insight into the perspectives of peers trained within a system that focuses on informal assessment.

### **Informal Assessment**

Informal assessment was an important area of skill development for the intern. Informal assessment strategies are invaluable for accessing specific areas of learning and development without the structure and time commitment of a formal assessment. The flexibility and reduced time requirement permits the educational psychologist to be more efficient in terms of time management. These strategies are especially important for gathering information at the preschool, primary and special provision levels, given the more limited attention span of these children and the paucity of valid standardized tests for this population. The intern had the opportunity to both observe a supervising educational psychologist during informal assessment and to independently utilize

numerous informal information gathering strategies, such as the pre-school assessment schedule, classroom observation (with and without checklists), the informal interview, and the sharing of the child's completed school work in various curriculum areas. Drawing, interacting with toys (i.e., puzzles, blocks), counting, naming letters and sounds, spelling, reading class texts, and completing math sums, as well as auditory discrimination activities, visual discrimination activities, tutorial sessions (i.e, precision teaching), and self-esteem questionnaires all played a part in information gathering. Informal assessment was also employed in discussion with the pupil regarding his or her responses to specific items on formal tests.

Educational psychologists can utilize such informal activities to acquire information while relying upon their psychological expertise in child development, cognition, perception, and language development. A background in education also allows the educational psychologist to draw upon a broad knowledge of teaching strategies as they relate to the general sequence of academic skill development in the areas of literacy and numeracy.

### **Formal Assessment**

The intern had previously developed extensive knowledge and skill in

utilizing numerous formal assessment instruments within the context of Newfoundland. However, none of these tests were employed within the British system. To ensure valid administration of psychometric tests widely used in England, and accurate interpretation of results, the intern studied the manual for each test, observed an experienced educational psychologist administer the test, and consulted with an experienced educational psychologist prior to each administration. This process enabled the intern to develop a clear understanding of which tests would be most appropriate for obtaining information about specific areas of difficulty. The intern developed competence in the utilization of the following British Psychometric tests:

- British Ability Scales
- British Picture Vocabulary Scales
- Weeshler Intelligence Scale for Children-UK (WISC-III UK)
- Neale Analysis of Reading Ability
- Macmillian New Reading Analysis
- Vernon's Graded Spelling Test

### **Time Management**

The *Code of Practice* (1994) prescribes strict time limits for initiating and

completing assessments, and the PAS (Policy and Guidelines, 1995) further outlines time allotment for required statutory work as well as the numerous other responsibilities defined for each educational psychologist. Effective time management is a critical component in fulfilling the position of an Essex educational psychologist. The intern focused on several areas of time management in order to utilize time more efficiently. Advance scheduling of school visits, which would obviously include the names of the children to be seen and areas of concern, enabled the intern to analyse case files and identify possible appropriate intervention prior to the school visit.

Another time efficiency practice is outcome-based consultation. Three visits of approximately three hours each are generally allotted to each school per term. During this time the educational psychologist may be requested to gather new information on several children and then consult with the SEN Coordinator and/or Head teacher on each child. For these visits to be effective, the educational psychologist has to clearly identify specific issues for consultation and guide the consultation process towards “agreed actions” on the part of both the educational psychologist and school personnel regarding the provisions necessary to meet the special educational needs of the children involved. A standard School Visit Summary form utilized by the Essex educational psychologists greatly assisted

the intern in this process (see Appendix C). Finally, concise report writing is critical to being an efficient educational psychologist. This time management focus forced the intern to alter her style of report writing from extensive reports in excess of 20 pages to writing concise summary reports of several pages in length.

## **SUMMARY**

The 12 week placement at the West Essex Psychology and Assessment Service provided the intern with an invaluable experience. The gradient of experiential involvement allowed the intern to work with increasing confidence and effectiveness within the British system. The broad case-load offered a range of experience, working with young people aged two-to-16 years of age representing the continuum of special educational needs. The responsibilities presented by such a case-load gave the intern practical experience in all aspects of intervention including consultation, informal assessment, formal assessment, report writing and program development. Reading and research was also necessary during the placement to build a strong knowledge-base in special needs education. This synthesis of knowledge acquisition, skill development and intense practical experience enabled the actualization of a level of competence requisite to working independently in the role of an educational psychologist.

## **PART II: RESEARCH COMPONENT**

**An Analysis of the Relationship between Term of Birth and the Identification of Special Educational Needs at Stages 1, 2, and 3 of the *Code of Practice*(1994) Stages of Assessment**

## REVIEW OF THE LITERATURE

Research in Britain spanning more than 30 years has identified a correlation between term of birth and academic achievement. Specifically, autumn-born (Sept-Dec) children perform better academically than children born in the spring (Jan-Apr) and these children in turn, performing better than summer-born children (May-Aug)(Armstrong, 1966; Thompson, 1971; Russell and Startup, 1985; Mortimore, Sammons, Stoll, Lewis, & Ecob, 1988; West & Varlaam, 1990). The British Education system adheres to a September 1 to August 31 calendar and, therefore, research findings illustrate a positive correlation between academic performance and age within the class.

Some initial research studies, focusing on season of birth, postulated a medical basis for this difference (Fitt, 1941; Orme, 1963). Orme (1963) speculated that summer-born children achieved less academically because they had been prenatally exposed to the many germs of winter during a sensitive period of fetal development. This theory has since been discounted in light of more recent research in Sweden and the United States. In these countries the education systems generally follow the calendar year (January 1 to December 31) for student admission. Research findings indicated that the youngest born within these systems are at an academic disadvantage while the oldest are at an advantage. In

Sweden and the United States, however, the youngest children are those born in December, which is opposite to England, and the oldest children are born in January (Berglund, 1967; Kinard & Reinherz, 1986; Morton & Courtneya, 1990).

At present, several factors have been identified as contributing to this consistent discrepancy in achievement: school-entry age, length of schooling and age-grouping. Although presented independently, these factors are clearly interrelated.

The theory that children are placed at a disadvantage by entering school early has received much support by researchers. As early as 1905, the Board of Education in England published a report stating that children 3-to-5 years of age received no academic benefit from formal education (Sharp, 1988). Play activities, rather than formal education appear to be the best form of intellectual stimulation for the cognitive development of these children (Ipaye, 1992).

West and Varlaam (1990) also outlined the benefits of the preschool curriculum and discredited the appropriateness of the regular primary school curriculum for children under five years of age. Data obtained from the London Borough of Barking and Dagenham indicated that older children appear to benefit more from nursery education than do younger starters. A group of 1,958 children were assessed at entry into reception class (similar to North American

kindergarten) in terms of their basic learning and language skills through a teacher observation checklist (The Bury Check). This checklist also presented a score cut-off point for the identification of "special needs". Of the sample, summer-born children scored significantly lower than the autumn-borns. Surprisingly, the results indicated that the summer-born children in the sample who attended nursery classes were twice as likely as autumn-born nursery attenders to be assessed as having "special needs". Summer-born children who attended the nursery classes were even more likely than autumn-born children **who did not attend** nursery classes to be assessed as having special needs. The autumn-born children clearly obtained greater benefit from nursery education than their summer-born peers (McGeachie & Benton, 1994).

An American study by Kinard and Reinherz (1986) investigated the effects of school-entry age on school performance at the time of school-entry and at Grade 4. The results presented the youngest group at school-entry with significantly lower cognitive ability scores (i.e., information processing) than the oldest group. However, at Grade 4 no significant differences were obtained. Crosser (1986) investigated the cognitive ability and academic achievement of a group of children all born within a four month period. Half of the children began kindergarten at the age of five and half began one year later, at 6 years of age.

Measures of cognitive ability and achievement levels were obtained from these children at Grades 6 and 5 respectively. The results lend strong support to the age-of-entry theory by indicating that the older starters performed significantly better than the early starters. Maddux, Stacy, and Scott (1981) investigated the school entry age for a sample of 188 elementary students labelled "gifted" and discovered that a significant number were late entry students.

The British *1993 Education Act* legislated that children must be enrolled full-time in school in the term following their fifth birthday. This policy, however, did not present restrictions with respect to a minimum age requirement for school admission. This flexibility permitted several admission policies to develop: termly (September, January, April), biannually (September, January), and annually (September). Within each of these policies, schools also vary with respect to admitting children following the fifth birthday or on the basis that the child will turn 5 years of age during that period of admission. Conceivably to account for the issue of school readiness, many British Local Education Authorities adopted the policy of accepting children into reception in the term in which they turn 5 years old. These children are referred to as "rising fives". Although it is assumed that these children may be more ready for formal schooling due to their reception experience, this practice created another concern

for the youngest in the class who would have a reduced length of schooling. Under this policy the summer-borns receive only one term of reception. In areas following the policy of admittance in the term following the fifth birthday, these children would not receive **any** reception education, but rather enter school in Year (Grade) 1. Many researchers have noted this as an important factor in the performance discrepancy between autumn and summer-borns.

A National Child Development Study (1978) provided data on 10,300 children, all born within the same week. The data were divided into two categories: "early enterers," those starting school at age 4 years 6 months-to-4 years 11 months; and "late starters" those beginning school at the age of 5 years-to-5 years 6 months. At age 11 years, the final year of the British primary school, these children were assessed with respect to academic attainment. Results favored those who received the greater length of schooling, in this case the "early starters" (Fogelman & Gorbach, 1978). Shearer (1967, cited in Thompson, 1971) stated that although summer-born children were disadvantaged due to reduced length of schooling, this disadvantage would dissipate for the more able students by age 11 years (i.e., Year 6).

Swedish (Berglund, 1967) and North American (Kinard & Reinherz, 1986; Morton & Courneya, 1990) research present findings which diminish support for

the length-of-schooling factor. Within the North American and Swedish systems children are typically admitted to school in September only, based on the criteria that they will turn 5 years of age during that calendar year. Although in this case there has been an equal length of schooling for all students, research within these systems indicates that the youngest students still perform significantly below the oldest students (Berglund, 1967; Kinard & Reinherz, 1986; Morton & Courtenya, 1990).

This finding, does however, lend support to the age-grouping theory. Classroom groupings of children indicate a 12 month range in age, for example the age range of children starting Grade 1 in September is 5 years (0 months) to 6 years (0 months). The education system has been greatly criticized with respect to its curriculum focus (average academic attainment), for not considering the differing levels of cognitive and emotional development among students and how this may affect school performance (Kinard & Reinherz, 1986). Research clearly indicates a significant difference between the youngest and the oldest in the class with the youngest group consistently performing below the oldest group (Mortimore, 1988; Shepard & Smith, 1986). Such grouping prescribe summer-borns in Britain to be the youngest of their classes throughout their school careers.

As indicated by Kinard and Reinherz (1986), there appears to be an initial

cognitive ability difference between the youngest and the oldest children at school entry, however this difference disappears. Similarly, Shepard and Smith (1986) suggested that although there is overwhelming evidence of a initial discrepancy in achievement between the oldest and the youngest in a year group, this difference is minimal (7-8 achievement test percentile points) and eventually disappears by the third grade. Several studies (Mortimore, 1988; Russell & Startup, 1986; McGeachie & Benton 1994.; West & Varlaam, 1990) have indicated that the effect of term of birth has much greater longevity, suggesting that the initial lack of cognitive readiness for formal education may lead to frustration; negative self-concept as a learner, especially when comparing self to older peers; and a poor attitude towards school.

An American study by Davis, Trimble and Vincent (1980) compared the youngest children and oldest children of Grades 1, 4 and 8 in terms of achievement scores in reading, language and mathematics. Results for Grade 1 and 4 illustrated that older students performed significantly better than the younger students in all areas. At Grade 8 this difference was still evident, however significance was only obtained for reading assessments. In Mortimore's 1988 study of 50 inner London schools, it was identified that summer-born students performed significantly below autumn-borns throughout Grades 3 to 6 on

measures of both reading and mathematics attainment. McGeachie and Benton (1994) analysed data from the National Foundation for Educational Research on the 1991 National Curriculum assessments of over 4,000 children. The data indicated significant differences in National Curriculum achievement between summer and autumn births in Grades 1, 6 and 11. In the same direction, significant difference was also identified by Russell and Startup (1986) who found a significantly higher proportion of autumn-born individuals within a population sample of 300,000 university graduates. Research within British classrooms clearly illustrates the oldest children attaining higher academic levels than the youngest. The fact that this is also found in North America and Sweden where the youngest children would actually be the oldest in Britain supports the theory that the difference in achievement is at least partially due to age-grouping rather than a simple lack of cognitive ability.

Studies indicate significant differences in academic performance between summer and autumn-borns (Davis et al., 1980; McGeachie & Benton, 1994; Mortimore et al., 1988). This marked gap in attainment appears to place summer-born children at risk for experiencing additional difficulties. The study by Mortimore et al. (1988) suggested a correlation between summer birth and behavior problems. By Year One, 23% of summer-born children, compared to

13% of autumn-born children were described by their teachers as having behavior problems (Mortimore et al., 1988). This may be due to frustration associated with low achievement, or it may be that the behavior of these students is immature and disruptive in comparison to their older peers.

Although summer-births demonstrate the same level of cognitive functioning and developmental progress as autumn-borns (Mortimore et al., 1988), they are younger (in some cases one year younger), and do not attain the same achievement levels as autumn-born children in mathematics, reading and language. In addition, as noted previously, these younger children are more often identified as having behavior difficulties. It is, therefore, a concern that a higher proportion of summer-births will be referred to, inappropriately, as having “special needs” (Bell & Daniels, 1990).

As early as 1970, Williams, Davis and Ferguson (cited in Bell & Daniels, 1990) identified that a higher proportion of summer-births were referred to the Child Development Centre and that a higher proportion of summer-births comprised the special education classes for moderate learning difficulties. This finding was also reported by DiPasquale, Moule, and Flewelling (1980). They investigated the correlation between birthdate and referrals for psychoeducational assessments for children of Grades K to 12. The results indicated a higher

number of referrals for the youngest school enterers. Maddux, Green, and Horner (1986) investigated school-entry age among children labelled learning disabled, mentally retarded, and emotionally disturbed. Results indicated a significant number of early enterers within the elementary school sample of learning disabled students. Generally, there was a higher number of early school enterers than late enterers in the learning disabled and emotionally disturbed categories. This trend was not found, however, in the group of students labelled mentally retarded, which is a less subjective label.

Bell and Daniels (1990) attributed the higher referral rates of early enterers to special education classes to the teachers' expectations and the lower attainment of these children. Children who start school at a younger age in terms of physical, social and cognitive development may be perceived by their teachers as the least mature learners and, as a consequence, they expect less of these children (Bell & Daniels, 1990; Carroll, 1992). In the study by Mortimore et al. (1988), teachers rated significantly more summer-borns, than autumn-borns, as having below average ability. There is also a concern that the use of teacher observation for rating learning ability and language skills may put the younger children at a disadvantage as posited by McGeachie and Benton (1994). Many studies addressed the effects of teacher expectancy on the academic performance of

children.

Raudenbush (1984) completed a meta-analysis of 18 such studies to obtain a clearer picture of teacher expectancy effects. The results suggested that the effects of teacher perceptions and expectations are intense initially, however, this effect is reduced over time and as the teacher develops more extensive knowledge of the student. A relatively strong teacher expectancy effect was identified in Grades 1-to-2. This effect seemed to disappear in Grades 3-to-6 and reappeared in Grade 7 when the student typically left for secondary school. It is expected that a teacher's knowledge of individual students increases over time, also when they are assigned a smaller number of students. This may shed some light on Armstrong's (1966) study of 24,000 eleven-year-olds which found that summer-born children (aged 11 years) in large urban schools were at a disadvantage in comparison to those attending small rural schools.

It is disconcerting that a proportion of children identified with special educational needs may **not** be experiencing actual learning or cognitive difficulties, but are displaying the effect of being early school enterers (i.e., premature exposure to formal schooling, less schooling, youngest in the group where the focus is on the average attainers).

## RATIONALE

The purpose of the present study was to investigate the relationship between term of birth and identification of special educational needs on Stages 1, 2, and 3 of the *Code of Practice Stages of Assessment*. Although the relationship of term of birth to special educational needs has been explored by previous researchers closure has been evasive. The 1994 *Code of Practice* provided a means to further examine the relationship(s) within a structured framework and a five-stage assessment process. The site for this investigation was Harlow, Essex, England. The education system in Harlow typically employs the “rising fives” admission policy (i.e., admission into reception in the term in which the child will turn 5 years of age). As well, the education system is guided by specific guidelines to ensure the most effective and appropriate identification of special educational needs (SEN). The *Code of Practice (1994)* states that pupils experiencing difficulty with the curriculum represent a continuum of special educational needs which must be addressed by a continuum of intervention. Although 20% of the school population present special educational needs, only approximately 2% of these needs are sufficiently complex to require an extensive formal assessment and a resultant Statement of special educational needs (*Code of Practice, 1994*). The Code postulates that the special educational needs of many

children will be sufficiently addressed at Stage 1, suggesting that many of the difficulties presented are due primarily to transient factors, such as attainment, which can be remedied by the extra individualized support at the Stage 1 level.

This study identified four small primary schools in Harlow (to obtain a sample population of approximately 700) and investigated the special educational needs cases within Year 3 to Year 6. Although Junior schools are comprised of Year 3 to Year 6 classes, primary schools were chosen for this study. Primary schools encompass Reception to Year 6 classes and it was expected that primary teachers would have a greater knowledge of the children in Year 3 to Year 6 classes, thereby reducing “teacher expectancy effects” (Bell and Daniels, 1990).

In light of previous research findings, and the guidelines of the *Code of Practice* (1994), several hypotheses were generated for the study. It was expected that a higher proportion of children identified with special educational needs would be summer-borns (May-Aug) as compared to Spring (Jan-Apr) and autumn-born (Sept-Dec) children. Research suggests that the discrepancy between summer-born and autumn-born children is mainly in the area of academic attainment, and therefore it was hypothesized that a higher incidence of the summer-born cases would be identified at Stage 1 of assessment. In accordance with the research on the longevity of the effect of Term of Birth on

performance (Davis et al, 1980; McGechie & Benton; 1994. Mortimore et al, 1988), it was hypothesized that the results of this study would present a higher proportion of summer-borns across Years 3, 4, 5, and 6 of schooling. Past research identified reading, language, maths and behaviour have been identified as areas of need more frequently associated with more summer-born children in comparison to autumn-born children (Davis et al., 1980; Mortimore et al., 1988). It was, therefore hypothesized that a higher frequency of these types of special educational needs would be associated with summer-born children.

## METHOD

### Population Sample

The population sample was comprised of 54 pupils, from Year 3 to Year 6 classes (7 to 11 years of age), who were identified as presenting special educational needs on Stages 1 to 3 as defined within the *Code of Practice (1994)* Stages of Assessment. This sample was drawn from four mainstream primary schools located throughout Harlow, West Essex, England. Three schools were public schools and the fourth was a denominational school (Church of England). The combined population of the schools presented a total of 695 pupils. All

children from this population presenting special educational needs and meeting selection criteria (as defined on page 70) comprised the sample population for the study (54 pupils).

**Procedure.**

The population sample was based upon the Special Educational Needs Registers of the four targeted primary schools. As described in the internship component of this report, Essex schools are obligated to provide for the special educational needs of children identified on Stages 1, 2 and 3 of the *Code of Practice* (1994) stages of assessment. To monitor this responsibility, the LEA requires schools to identify such children in Special Educational Needs Registers. Record forms presenting each child's needs, and the school's provisions to meet these needs, are required to be maintained by the schools for each assessment stage.

Following permission from the Divisional Senior Educational Psychologist and Area Senior Educational Psychologist of the Essex County Psychology and Assessment Service, formal written requests were forwarded to the identified schools to obtain access to this information (see Appendix D). School visits were then scheduled for the purpose of analysing the Registers of

Special Educational Needs. To control for extraneous variables that might potentially confound the study, cases with identified causal factors for the special educational need (clearly not related to term of birth) were not included in the study sample. This included cases in which children had been diagnosed as having mental retardation, severe learning disabilities, organic-based disorders (i.e., epilepsy, brain injury), severe sensory disabilities (i.e., visual impairment, hearing impairment, mutism), physical disabilities, or spoke English as a second language. Also excluded were students who had been retained a year from entering school to avoid being the youngest in their class. During the data collection school visits, interviews were conducted with the SEN Coordinator and/or the Head teacher to ensure effective screening-out of students aligning with the above restrictions.

Data was obtained for each acceptable SEN case in terms of: term of birth (i.e., Sept-Dec, Jan-Apr, or May-Aug), Stage of Assessment (1 to 3) year/grade, and specific special educational need. The specific special educational need was identified by the school as the “area of concern”. In cases where behaviour and learning were both presented as areas of concern for a specific case, the intern analysed previous assessments, with respect to achievement and ability tests, and consulted with the SEN Coordinator or Head

teacher to identify the main area of difficulty. Four categories of special educational need emerged: literacy (i.e., reading, writing, spelling), literacy and numeracy, language (i.e., speech therapy, language comprehension), and behaviour.

## RESULTS

The results indicated a considerably higher proportion of special educational needs (SEN) cases for summer-born children (Term 3) than for autumn-born children (Term 1). Table 2.1 presents the percentage of SEN cases for each term of birth. Term 3 children comprised almost 50% of the total number of SEN cases, followed by Term 2 at 28% and Term 1 at 24%. The percentage of summer-born children identified with special educational needs is double that of autumn-borns.

**Table 2.1**Percentage of Special Educational Needs Cases per Term of Birth

<b>Term of Birth</b>	<b>Percentage of SEN Cases</b>
Term 1 [Autumn]	24%
Term 2 [Spring]	28%
Term 3 [Summer]	48%

Tables 2.2, 2.3, and 2.4 illustrate the percentage of SEN cases identified per Term of Birth at each Stage of Assessment (1 to 3). At Stage 1 there is an increase in SEN cases from Term 1 to Term 3 of birth, with the proportion of Term 3 cases being double that of Term 2, and triple that of Term 1. At Stage 2 the proportion of Term 1 and Term 2 cases are equal at 27% each, while Term 3 cases comprise 47%. At Stage 3 the proportion of Term 1 and Term 2 cases are again equal at 29% (slightly greater than Stage 2) and Term 3 cases, while still the greatest percentage by far, comprise 41% (reduced from 47% at Stage 2). The proportion of summer-born cases decreased from Stage 1 to Stage 3, whereas the proportion of autumn-born cases increased from Stage 1 to Stage 3. The number of SEN cases per Term of Birth and Stage of Assessment is graphically presented

in Figure 2.1. Stage 1 illustrates the greatest difference between the three Terms of Birth. This difference between the three Terms with respect to proportion of cases decreases steadily to Stage 3, where the difference does not appear significant. The largest number of Term 1 SEN cases is at Stage 3 of Assessment, whereas the largest number of Term 2 and Term 3 cases appear at Stage 1 of Assessment. The number of Term 1 cases is consistent at Stages 1 and 2, and then increases at Stage 3. The number of Term 2 cases drops from Stage 1 to Stage 2 and then mirrors the number fluctuation of Term 1 from Stage 2 to Stage 3. The number of cases for Term 3 children decreases by almost 50% from Stage 1 to Stage 2 and then remains stable from Stage 2 to Stage 3.

**Table 2.2**

Percentage of SEN Cases per Term of Birth at Stage 1 of Assessment.

<b>Term of Birth</b>	<b>Percentage of SEN Cases</b>
Term 1 [Autumn]	18%
Term 2 [Spring]	27%
Term 3 [Summer]	55%

Note: percentages have been rounded to the nearest whole number.

**Table 2.3**Percentage of SEN Cases per Term of Birth at Stage 2 of Assessment.

<b>Term of Birth</b>	<b>Percentage of SEN Cases</b>
Term 1 [Autumn]	27%
Term 2 [Spring]	27%
Term 3 [Summer]	47%

Note: percentages have been rounded to the nearest whole number.

**Table 2.4**Percentage of SEN Cases per Term of Birth at Stage 3 of Assessment.

<b>Term of Birth</b>	<b>Percentage of SEN Cases</b>
Term 1 [Autumn]	29%
Term 2 [Spring]	29%
Term 3 [Summer]	41%

Note: percentages have been rounded to the nearest whole number.

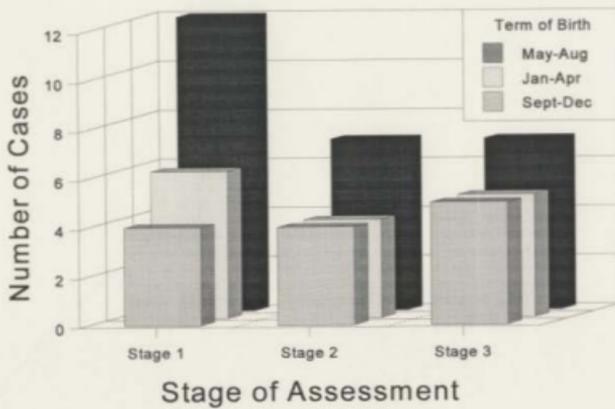


Figure 2.1. Number of Special Educational Needs (SEN) Cases per Term of Birth and Stage of Assessment.

The data were also analyzed with respect to the proportion of SEN cases per Year of school (see Table 2.5). Year 3 cases comprised 39% of the total number of cases, followed by Year 4 and Year 6, at 26%. Year 5 presented 9% of the cases, a considerably smaller proportion.

**Table 2.5**

Percentage of SEN Cases per Year in School

Year	Percentage of SEN cases
3	39%
4	26%
5	9%
6	26%

Note: percentages have been rounded to the nearest whole number.

Table 2.6 presents the number of SEN cases per Year of School and Term of Birth. No consistent trends are illustrated across years and Terms. It may be worthwhile to mention, however, that both Term 2 and Term 3 presented their greatest number of cases within Year 3, this number decreased consistently to Year 5 and then increased at Year 6. This trend was also present for Term 1 cases from Year 4 to Year 6. Year 3 presented the greatest range in case numbers per

Stage of Assessment (see Table 2.7).

**Table 2.6**

Total Number of SEN Cases per Year of School and Term of Birth

YEAR	TERM OF BIRTH		
	Term 1	Term 2	Term 3
3	3	8	10
4	3	3	5
5	1	0	4
6	3	4	7

**Table 2.7**

Total Number of SEN Cases per Year of School and Stage of Assessment

YEAR	STAGE OF ASSESSMENT		
	Stage 1	Stage 2	Stage 3
3	10	4	7
4	4	4	6
5	3	2	0
6	5	5	4

When the special educational needs cases were analyzed with respect to the Type of Need, four categories emerged (see Table 2.8). The percentage of cases falling within each of these categories is presented in table 2.8. Literacy was the most prominent area of difficulty indicated (eg., reading, writing, spelling) and the least prominent was Language. Figure 2.2 presents the number of SEN cases within each category per Term of Birth. Term 3 cases comprised the greatest number of cases for each of the categories and demonstrated proportions similar to those presented in table 2.8. The greatest number of Term 3 cases was presented in the Literacy category, followed by the Literacy & Numeracy, and Behaviour categories (each with seven cases), and the Language category (with three cases). Literacy cases also comprised the greatest proportion of Term 1 cases, however the Behaviour cases slightly out numbered Literacy and Numeracy cases. Term 2 presented an equal number of cases within each of the categories. The smallest discrepancy between the three Terms of Birth was illustrated within the Behaviour special educational needs category.

**Table 2.8**

The Percentage of Special Educational Needs Cases per each category of Need.

<b>Category of SEN</b>	<b>Percentage of SEN Cases</b>
Literacy	39%
Literacy and Numeracy	28%
Behaviour	28%
Language	6%

Note: percentages have been rounded to the nearest whole number.

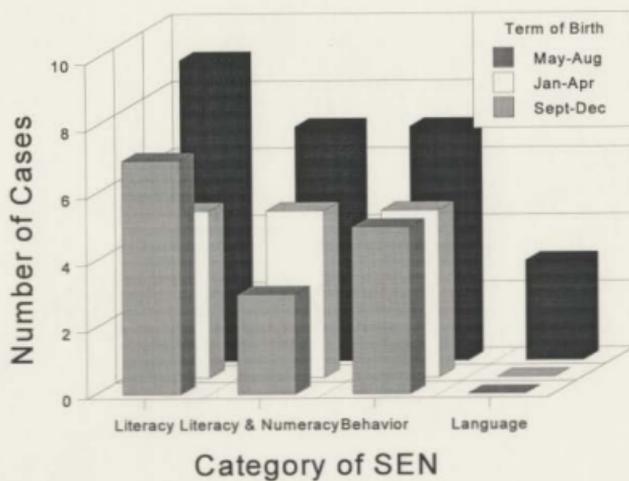


Figure 2.2. Number of Special Educational Needs Cases per Category of SEN and Term of Birth

Table 2.9 presents the proportion of cases within each special educational needs category per Stage of Assessment. The greatest proportion of Literacy cases was identified at Stage 2, followed by Stages 1 and 3. The greatest proportion of Literacy and Numeracy cases were identified at Stage 3, followed by Stages 1 and 2. The Behaviour cases were divided between Stages 1 and 3. The majority of the Language cases (2) were identified at Stage 1.

**Table 2.9**

Percentage of Cases per SEN Category at Each Stage of Assessment.

CATEGORY	STAGE			[Total]
	1	2	3	
Literacy	38%	52%	10%	[100%]
Literacy and Numeracy	33%	20%	47%	[100%]
Behaviour	47%	0%	53%	[100%]
Language	67%	33%	0%	[100%]

Note: percentages have been rounded to the nearest whole number

## DISCUSSION

The results clearly support the hypothesis that a higher proportion of identified special educational needs cases identified are summer-born children. Almost 50% of the case sample was comprised of summer-born children. The remaining cases were shared fairly evenly between spring-born (28%) and autumn-born children (24%). This gradient in terms of special educational needs presents a perfect negative correlation with research found in the area of achievement. This result is supported by West and Varlaam (1990), who found that children born in the autumn performed better academically than those born in the spring, who performed better than those born in the summer. All the children within this sample were exposed to a "rising fives" termly admission policy characteristic of the United Kingdom. Therefore, according to the age-of-entry research (Ipaye, 1992; Sharpe, 1988), were better equipped to benefit from formal education. Under this admissions policy, however, length-of-schooling and age-grouping vary with term of birth. All reception students (irrespective of length of time in reception) commence Year 1 in September and therefore there is a 12 month difference in the age of students. This age grouping presents children just turning 5 years of age, with one term of reception, facing Year 1 curriculum with

5 and 6-year-olds who have experienced two and three terms, respectively, of reception education. These factors correlate with the term of birth and are consequently important in interpreting the results.

The hypothesis that a higher proportion of summer-borns cases are identified at Stage 1 of Assessment was also supported by the results of this study. Analysis of the proportion and number of SEN cases per Term of Birth and Stage of Assessment presented trends supportive of the length-of-schooling factor. Autumn-born children (three terms of reception) presented consistently low case numbers at Stages 1 and 2, and a slightly greater number at Stage 3. Spring-born children (two terms of reception) presented their highest number of cases at Stage 1 and then dropped to mirror the case number of autumn-borns at Stages 2 and 3. For the Spring-borns, this trend away from autumn-borns at Stage 1 may suggest the influence of one less term of schooling.

Summer-borns (one term of reception) presented the highest number of cases at Stage 1, more than double spring-borns and triple that of autumn-borns. This number dropped almost 50% and then remained consistent across Stages 2 and 3. The decrease in the proportion of summer-born cases and consistently low proportion of autumn-born cases from Stages 1 to 2 of assessment suggests that a higher proportion of the summer-born cases may have presented difficulties of a

mild nature (eg. related to attainment), whereas a higher proportion of the autumn-born cases presented more complex or severe difficulties requiring more intensive assessment and intervention (eg. learning disabilities). Accordingly, this suggests that the assessment and intervention process at Stage 1 was sufficient to separate children with mild transient difficulties from those with more persistent and complex difficulties. To state succinctly, Stage 1 of Assessment appears to separate attainment-based difficulties due to reduced length of schooling from more persistent cognitive-based difficulties.

Mortimore et al. (1988) found that reading attainment for summer-borns remained consistently behind autumn-borns who had received more education. Interestingly, however, according to Mortimore et al (1988) there was no difference found between the two groups with respect to reading progress, therefore suggesting that an initial gap in attainment due to the variation in length of schooling was not overcome. It is suspected that extra assistance for improving attainment levels would reduce this difference between the two groups.

Results did not support the hypothesis that summer-borns would illustrate the highest proportion of cases across all Years of Schooling. It should be noted that there was an insufficient number of special educational needs cases to adequately analyse with regards to age-grouping (i.e., Term of Birth and Year of

Schooling), however, three of the four year groups presented summer-borns as comprising more than twice the number of SEN cases of autumn-born pupils. This finding for the Year 6 group supports Fogelman and Gorbach's (1978) investigation which identified a significant effect of initial schooling on the academic achievement of 11-year-olds. Similarly, these findings lend some support to the study by Mortimore et al (1988) which noted a discrepancy in achievement levels between summer and autumn-born in areas of mathematics, reading and language for Years 3 to 6. This finding, therefore, opposes the view presented by Shepard and Smith (1986) that the disadvantage of being the youngest in the year group disappears by Grade 3.

The number of SEN cases dropped considerably from Year 3 to 4, and decreased again slightly to Year 5, however this was followed by a large increase at Year 6. This Year 6 increase was presented across all Terms of Birth. It is postulated that this increase may be the result of increased concern for these children, by parents or teachers, in light of the quickly approaching transition to secondary school where classroom Teacher Assistant resources are typically reduced.

The hypothesis that a higher proportion of cases for each category of special educational need would be presented by summer-borns as compared to

autumn and spring-borns was supported by the findings of this study. Previous research has clearly indicated a discrepancy between autumn-born and summer-born children with respect to attainment in areas of mathematics, reading, and language ( Davis et al, 1980; Mortimore et al., 1988). Within the education system, achievement level is utilized as the basic indicator of difficulty with the curriculum. It is therefore it is expected that children performing at the lower end of the achievement continuum would be identified as having special needs (Bell & Daniels, 1990; McGeehie & Benton, 1994).

#### **SUMMARY**

The results of the present study indicate sizeable term of birth effects with regard to identification of special educational needs. That is, summer-borns comprised a considerably higher proportion of special educational needs cases than spring or autumn-born children. As well, summer-born children comprised a higher proportion of each type of special educational need cases than spring or autumn-born children. Summer-borns did not however, constitute a higher proportion of cases for each year of schooling investigated.

These results support the concern raised by Bell and Daniels (1990) that a higher proportion of summer-borns are referred to, inappropriately, as having

special educational needs. Ironically, it appears that a proportion of students may be identified as having special educational needs due to the fact that they have not attained the same levels of achievement as pupils one year older and with more education. This problem was raised in 1970, when Williams et al. speculated that the relationship between “birthdate effect” and learning difficulties could be merely a product of the educational system. It is crucial for the education system to focus on the development of individual students. The new British National Curriculum (1994) provides teachers with guidelines for the differentiation of curriculum for individual students, however it is important for teachers to be aware of the age groupings and the length of schooling of their pupils. An assumption of equality with respect to age and educational experience erroneously leads to the presumption that differences in performances are a result of cognitive ability.

Support, such as that provided through the early Stages of Assessment and intervention prescribed by the *Code of Practice* (1994), is necessary to overcome the obvious hurdle for summer-borns. The *Code of Practice* (1994), in dictating a focus on the individual child, indicates the need for individualized education rather than merely providing more education for struggling students. This is an important difference when prescribing educational programming for summer-

borns (Carroll, 1992). The *Code of Practice* Stages 1, 2, and 3 of Assessment assist schools in providing the necessary assessment and intervention for individual students presenting difficulties with the National Curriculum.

### LIMITATIONS

The primary aim of this qualitative study was not to produce generalizations, but rather to contribute to the existing knowledge-base while illustrating the necessity of further investigation in this area. For the benefit of future research, several limitations associated with this study are presented. An initial investigation of the total student population (695) was not completed to ensure that each term of birth was equally represented. It is therefore unknown as to whether each term of birth comprised equal proportions of the total population. If summer-borns comprised a higher proportion of the total population sample it would be expected for this group to also comprise a higher proportion of special educational needs sample.

The investigation of type of special educational need was very problematic. Only four schools were included in this study, all of which were located in Harlow, Essex. This presents a number of problematic aspects which must be acknowledged. Although the *Code of Practice* (1994) presents guidelines

for the identification of special educational needs, there is still room for individual interpretation and teacher expectancy effects. Identification of a difficulty as a special educational need depends on the knowledge and expertise of the school personnel. Variation in the expertise of the school personnel and their consultants (i.e., educational psychologists) greatly affects whether a child will be identified or not and also the specific concern noted. For example, varying school organization (eg., open-plan classroom versus a structured classroom) may result in a specific behaviour being identified as problematic in one school, however, not in another.

Also, according to the guidelines for case restriction, children presenting Attention Deficit Hyperactivity Disorder (ADHD) should not have been included due to the medical basis for their behaviour difficulties. The British system, however, is cautious in attaching this label and therefore some children with ADHD may have been included in the behaviour category of special educational need. As indicated in the internship component of this report, Harlow delivers extended specialized services to specific groups of special educational needs children outside of the mainstream school system. The proportion of the various types of special educational needs presented in this study, therefore, may not be representative of the actual proportions.

Data analysis was limited due to the small population sample size. The total of 54 cases did not allow for adequate comparisons when analysed with respect to two or more factors. This was especially true when analysing the number of cases per SEN category per term of birth and per year of schooling, and therefore this analysis was not completed. Nevertheless, many of the hypotheses were supported and various new facets of the “age of school entry” issue were scientifically explored.

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**APPENDIX A**

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Your ref

Our ref PAS / AM / 1.11

Date 29 March, 1996

Enquiries to Anthony Murphy / Lee Harrold



Essex County Council  
Education

Paul Lincoln MA  
Director of Education

To whom it may concern,

**Reference for: Ms Angela Wilmott**  
**Trainee Educational Psychologist**  
**Memorial University of Newfoundland**  
**St Johns, Newfoundland**

I supervised the fieldwork placement of Ms Wilmott from 1 January 1996 to 29 March 1996, during which time she was in the final stages of her professional training.

I observed Ms Wilmott's work over a wide range of areas, such as learning disabilities / difficulties, reading disabilities / difficulties, speech and language difficulties, mathematical difficulties, behaviour problems, emotional problems and Aspergers syndrome.

It was clear from the outset that Ms Wilmott was very well versed in her overall knowledge of the literature in these areas of the psychologist's work. In each of the areas mentioned, Ms Wilmott was able to take a very broad view, encompassing knowledge about causes of various difficulties, assessment strategies to be employed and crucial issues such as organisation difficulties experienced by schools and implications for parents.

Ms Wilmott is well versed and accomplished in, informal assessment, formal assessment, consultation with e.g. teachers and parents, report writing, choice of appropriate assessment strategies, interpretation of results. It is apparent Ms Wilmott is also very capable of working within a team of psychologists, administrative and support staff. She has maintained excellent relationships at all levels within this department during her period of time with us.

Ms Wilmott appears knowledgeable and accomplished at providing psychological services for children throughout the entire age range, i.e. pre school, primary, secondary and throughout the range of special provision.

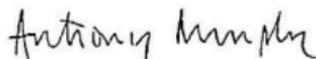
Ms Wilmott has a high level of skill in interacting with teaching staff at all levels up to and including the Headteacher. She is able to relate to teachers in a professional manner whilst putting them at ease and enabling them to fully illustrate and explain their concerns.

Ms Wilmott's skills with parents are also well developed. She appears very insightful about the emotional reactions within a family and the implications of these for the child's emotional life and behaviour in school. Ms Wilmott is able to increase parents understanding about the child's emotional and social development, in a clear and jargon - free manner, without patronising the parent and always allowing the parent to feel that their point of view has been fully heard and acknowledged.

Ms Wilmott breadth of perspective of educational psychology issues is highlighted by her interest in other fields, such as stress management. She clearly has a long standing interest in this subject and has produced a significant amount of written material.

I can recommend her without reservation.

Yours sincerely

A handwritten signature in cursive script that reads "Anthony Murphy".

Anthony Murphy  
Chartered Educational Psychologist

**APPENDIX B**

MATERIALS READ DURING INTERNSHIP PLACEMENT

Cooper, B. (1995). Inside the Wisc-III <sup>™</sup>. Educational Psychology in Practice, 10, 215-219.

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- Neale, M. D. (1989). Neale analysis of reading ability: Revised British Edition. Great Britain: NFER-NELSON.
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- Rickerby, S., & Lambert, S. (1994). Listening skills: Key stage 1. The Questions

Publishing Company: England.

Sheridan, M. D. (1980). From birth to five years. Windsor, Berks: NFER-Nelson.

Scherer, M., Gersch, I., & Fry, L. (1992). Meeting disruptive behavior: assessment, intervention & partnership. London & New York: Routledge.

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Note: much of the information presented to the intern was produced by supervising educational psychologists or derived from various sources, and therefore references were unavailable.

**APPENDIX C**

## School Visit: Summary Report



School:

Date of Visit:

Visit Length:

EP:

Pupil/Issue	ESA	Year	Summary	Agreed Actions / Recommendations

# Erica Cream - Counsel - Educational Psychology Service

Signature of EP: \_\_\_\_\_

Date: \_\_\_\_\_

**APPENDIX D**

Psychology and Assessment Service  
Brays House, Traeyes Road  
Harlow, Essex  
CM18 6EH

February 6, 1996

Head Teacher

Dear \_\_\_\_\_,

I would like to take this opportunity to introduce myself. I am an Educational Psychologist Trainee from Canada, who is completing a winter term placement in West Essex under the supervision of Jill Tresadern and Anthony Murphy. As part of my placement I shall be pursuing a research project. This will focus on children with learning difficulties within several West Essex schools. Your cooperation as a chosen school would be greatly appreciated.

The focus of the research shall be on students in Years 3 to 6, who have been identified on Stages 1, 2 or 3 of the Essex Stages of Assessment. I would like to restrict the following, however, from this group: (1) students who have a medical cause for their learning difficulties; (2) students who speak English as a second language; (3) students with sensory and/or physical disabilities; (4) students whose reception year offered only one entry date (i.e., not a staggered entry format); and (5) students who were held back a year from entering reception. The information needed on the remaining students would be: date of birth; type and intensity of difficulty; and stage of assessment. This information should be accessible through the Register of Special Needs and/or Record Forms.

Due to the very limited time allotted for research within my placement, it would be greatly appreciated if this information could be made available at the earliest possible date. If you would like any additional information concerning this research project please contact me at the Psychology and Assessment Service office (01279 439266), otherwise I shall be in contact with you within the next few days. Thank you.

Sincerely,

Angela Wilmott







