

1-31-2017


# The Theory of Special Education and the Necessity of Historicizing: A Multilogue Response to Benjamin Kelsey Kears and Donald Warren

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### Recommended Citation

Ellis, Jason. "The Theory of Special Education and the Necessity of Historicizing: A Multilogue Response to Benjamin Kelsey Kears and Donald Warren." *Education's Histories* 4 (January 31, 2017). <https://scholarworks.umt.edu/eduhist/vol4/iss1/1>

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## *Education's Histories*

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Notes

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## **The Theory of Special Education and the Necessity of Historicizing: A Multilogue Response to Benjamin Kelsey Kearl and Donald Warren**

*Jason Ellis*

Theory, especially the new and engaging sort, is a welcome addition to the special education historiography. Benjamin Kelsey Kearl's essay in two parts offers readers one fresh and exciting interpretation of the historical meaning and significance of special classes and programs. In this response to Kearl, I argue that alongside the theoretical work he does, historians still need to do research that historicizes special education's many features in order to draw out the multiple historical meanings and wider significance to the educational history of the special classes that first appeared as a reform in American and Canadian schools over a century ago.

### **Theory**

The substance of Kearl's essays is that "classificatory schemes" in special education relied on elastic borderlines that could be taken in or let out, often as general education required. These elastic borders—and special education more generally—Kearl argues, are significant for what they reveal about general education in the Progressive Era. He writes:

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Definitional fluidity and borderliness enabled the science of [sic] classification to remain operative throughout the Progressive Era and suggests a lesson about the educational use value of indeterminacy, a lesson that is not about the accuracy of this or that classification but about education's need to classify difference as a way to define itself.<sup>1</sup>

<sup>1</sup> Benjamin Kelsey Kears, "Of Laggards and Morons: Definitional Fluidity, Borderliness, and the Theory of Progressive Era Special Education," *Education's Histories*, Part 1, November 15, 2016, <http://www.educationshistories.org/laggards-morons-definitional-fluidity-borderliness-theory-progressive-era-special-education-part-1/>.

<sup>2</sup> Ibid.

<sup>3</sup> See Joel H. Spring, *The Sorting Machine: National Educational Policy since 1945* (New York: McKay, 1976).

<sup>4</sup> For a slightly different interpretation of "borders" in mental deficiency, see Mark Jackson, *The Borderland of Imbecility: Medicine, Society and the Fabrication of the Feeble Mind in Late Victorian and Edwardian England* (Manchester: Manchester University Press, 2000).

<sup>5</sup> Kears, "Of Laggards and Morons: Definitional Fluidity, Borderliness, and the Theory of Progressive Era Special Education," *Education's Histories*, Part 2, November 17, 2016, <http://www.educationshistories.org/laggards-morons-definitional-fluidity-borderliness-theory-progressive-era-special-education-part-2/>.

<sup>6</sup> Donald Warren, "Escaping Befriended Circles: A Multilogue Response to Benjamin Kelsey Kears's Of Laggards and Morons: Definitional Fluidity, Borderliness, and the Theory of Progressive Era Special Education," *Education's Histories*, December 16, 2016, <http://www.educationshistories.org/escaping-befriended-circles-a-multilogue-response-to-benjamin-kelsey-kears-of-laggards-and-morons-definitional-fluidity-borderliness-and-the-theory-of-progressive-era-special-education/>.

To sustain its own existence, Kears contends, education was compelled to "order difference"—and no area excelled at this more than special education.<sup>2</sup>

Looking on public education as a vast "sorting machine" is not an entirely new interpretive approach.<sup>3</sup> But what is novel about Kears's contribution is how he theorizes special education and its (shifting) borders as integral to ordering difference. Borderline definitions, such as the "moron," were useful to special and general education in that borderline terms could still sort and collect the students who were neither round general education pegs to fit into round graded class slots, nor square special education pegs to fit into square slots—but rather who were otherwise misshapen pegs, borderline cases, that did not quite fit in either. "Moron" was doubly useful because it was also a sufficiently loose term that it could stand for a lack of intelligence that occurred alongside normal appearance, or normal appearance and a lack of morality, or usually a conflation of all of these things.<sup>4</sup> Bringing us back to his argument about what special education can tell us about Progressive Era general education, Kears asserts that borderline definitions such as "moron," in addition to being important in their own right, are more significant for the way that they "reify the sovereign power of experts to draw lines of inclusion and exclusion that accordingly determine allowed degrees of proximity and allowable movements of ingress and egress."<sup>5</sup> In short, "borderliness" makes the whole "classificatory" enterprise possible. As Don Warren observes in his essay responding to Kears, this is an indictment of "education science" for masquerading as something objective when it is actually politically embedded.<sup>6</sup>

## Necessity of Historicizing

Kearl’s two-part essay quite convincingly shows that special education is a far more important piece in the puzzle of explaining Progressive Era general education than historians have heretofore assumed. Indeed, I agree. I see special education as one of the best examples—if not the best example—of both the initial appearance and eventual wide spread of administrative progressivism, the form of progressivism that Kearl is describing most closely.<sup>7</sup>

It is all well and good to study special education as a way of understanding the sorting function of general education, not least of all in the Progressive Era where sorting emerged in force. However, “special education” is still very important in its own right, quite aside from what it can tell us about general education. We should not overlook this in our earnestness to theorize the former or the latter. It is worth noting that special education historically consisted of much more than “classificatory schemes” for learners and non-learners. From the very outset, special education’s aims and objectives were broad, and diverse, in ways that are worth historicizing in detail if we are to comprehend the full meaning and significance over time of this Progressive Era reform.

First of all, to historicize special education means to acknowledge that it was broad in that it represented a wide set of classes and programs from its outset.<sup>8</sup> These classes were not just for classifying “laggards,” “morons,” and the like—though special education certainly fulfilled that function. Instead, already by 1920—if not earlier than that—city school systems in the United States and Canada had classes for so-called “mental defectives.” But they also had sight-saving, speech correction, and hard-of-hearing or deaf classes. There were forest schools for the sickly, foreign classes for the newly arrived immigrant, and orthopedic classes for children with physical disabilities.<sup>9</sup> All fell under the heading “special education,” a term that came into official use around this time.<sup>10</sup> Yet each of these types of class was quite different from the others, in a way that focusing on classes for “mental defectives” alone tends to obscure.

Secondly, the functions of special education were already by 1920 as well quite wide, varied, and at

<sup>7</sup> David B. Tyack, *The One Best System: A History of American Urban Education* (Cambridge, MA: Harvard University Press, 1974).

<sup>8</sup> Kearl refers briefly to J.E. Wallace Wallin’s observation about special education’s diversity and breadth. Kearl, “Of Laggards and Morons,” Part 1.

<sup>9</sup> See especially Robert L. Osgood, *The History of Special Education: A Struggle for Equality in American Public Schools* (Westport, CT: Praeger, 2008).

<sup>10</sup> See for example “F. Special Classes,” in *White House Conference on Child Health and Protection. Preliminary Committee Reports* (New York: The Century Co., 1930), 314–43.

times contradictory. One function was, as Kearsley shows, to categorize, track, and ultimately often to control children who were disabled, different, difficult, or even threatening. But this was hardly all that special classes did, not even close. And the additional functions make special education historically significant in several different ways. Another function of special classes was to uncover the nature and cause of learning problems. A third function was to diagnose and treat those problems, at least for the children whose difficulties educators believed they could remediate. This did exclude “morons.” But it encompassed many other children—the ones who should have been able to read, but could not, or whose speech was impaired, or who were deaf, or who had bad eyesight, amongst others. A fourth function was to overhaul and diversify a rigid curriculum, to better align it with more diverse needs—perceived or real—not just of special class pupils, but of a heterogeneous school population. And a fifth function was socially progressive, to save and uplift urban children who labored under very real handicaps of illness, disability, foreignness, and poverty.<sup>11</sup>

<sup>11</sup> See Jason Ellis, *A Class by Themselves? Children, Youth, and Special Education in a North American City—Toronto, 1910–45* (forthcoming book).

Many historians who have studied special education have underestimated its ability to fulfill these varied functions simultaneously. This is understandable. It can be difficult to see how special education, which undeniably had direct ties to eugenics, could be anything other than social control. Yet it was more than that. In fact, it could be malevolent and benevolent at the same time. There were, of course, the H.H. Goddards. These mental deficiency experts had a penchant for the sort of eugenic rhetoric that historians find eminently quotable. But there were also humanitarians, many of them the unsung special education teachers who treated their students with empathy and dignity.

An underestimating of special education’s diversity historically is also a result of the theoretical approaches historians have taken to the topic. In fact, special education is—as topics in the history of education go—more theorized than many. Scholars who approach special education history theoretically, as opposed to empirically, have a tendency to focus on one or another of special education’s functions singularly, without adequate regard for its other functions. Often this occurs innocently enough, part and parcel of the historian’s attempt to develop a theory of special education’s one true aim. Joseph Tropea (whom Kearsley cites), for example, studied special education’s social control function. Dismissing the ostensible reasons that educators gave for

assigning children to special classes, he asserted that in fact they often employed these reasons merely as cover, an excuse to use the classes to tidily dispense with troublesome pupils, whether they were disabled or not.<sup>12</sup> This likely did happen to some. But I would argue that it is hard to see it as the sole aim of special classes, part of a vast near-conspiracy of social control forces.

There is a place for Tropea's revisionist take on special education, and other interpretations like it (such as Barry Franklin's much more sophisticated work.)<sup>13</sup> One function of special education was social control. These accounts are helpful as well in that they correct the interpretation of special education's history that its house historians offered, and sometimes continue to present.<sup>14</sup> They stressed the social uplift function of special classes, while looking past inconvenient connections to eugenics and racism. But the fact of the matter is this: Special education historically has possessed the capacity to be both social control and social uplift, usually simultaneously.

The related point is that, historiographically, attempts to *theorize* special education in one way or another have unfortunately skewed and narrowed interpretations of its historical significance. Typically the skewing has gone in one of two directions, either in favor of a malevolent social control or a benevolent social uplift thesis. This not surprisingly follows the same major fault line—a revisionist versus a liberal interpretation—running through history of education as a field for the last five or more decades.<sup>15</sup>

This is why we still need more studies of different aspects of special education's history, especially ones that historicize thoroughly by casting a wider interpretative net than a singular theory (social control or munificent reform) allows.<sup>16</sup>

Consider the case of intelligence quotient (IQ) testing's impact on early special education. Historians such as Paul Davis Chapman and Ann Marie Ryan and Alan Stoskopf, who have looked at IQ testing and special education have emphasized how the tests enhanced the classifying function of special classes.<sup>17</sup> Undoubtedly they did. These historians present convincing evidence that urban public school bureaucracies pounced upon the IQ test as a valuable classificatory tool, not least of all

<sup>12</sup> Joseph L. Tropea and "Bureaucratic Order and Special Children: Urban Schools, 1890s–1940s," *History of Education Quarterly* 27, no. 1 (1987): 29–53 and "Bureaucratic Order and Special Children: Urban Schools, 1950s–1960s," *History of Education Quarterly* 27, no. 3 (1987): 339–61.

<sup>13</sup> Barry M. Franklin, *From "Backwardness" to "At-Risk": Childhood Learning Difficulties and the Contradictions of School Reform* (Albany: SUNY Press, 1994).

<sup>14</sup> See for example, Kimberly Kode, *Elizabeth Farrell and the History of Special Education*, Kristin E. Howard, ed. (Arlington, VA: Council for Exceptional Children, 2002).

<sup>15</sup> Jason Ellis, "The History of Education As "Active History": A Cautionary Tale?," September, 24, 2012, <http://activehistory.ca/papers/history-papers-11/> 24 September 2012.

<sup>16</sup> Robert L. Osgood, *For "Children Who Vary from the Normal Type": Special Education in Boston, 1838–1930* (Washington: Gallaudet University Press, 2000).

<sup>17</sup> Paul Davis Chapman, *Schools as Sorters: Lewis M. Terman, Applied Psychology, and the Intelligence Testing Movement, 1890–1930* (New York: New York University Press, 1988); Ann Marie Ryan and Alan Stoskopf, "Public and Catholic School Responses to iq Testing in the Early Twentieth Century," *Teachers College Record* 110, no. 4 (2008): 894–922.

where special education was concerned.

But as I have argued elsewhere, IQ testing led to transformations in several of special education's other functions as well. Historians have paid too little attention to how IQ transformed prevailing attitudes about the nature and cause of learning difficulties, special class curricula and instructional methods, and procedures of pupil assessment and testing.<sup>18</sup>

As just one brief example of these transformations, consider how IQ testing altered one function of special education: defining the nature and cause of learning problems. The arrival of IQ testing forever altered the terms of this debate. In the 1910s, educators had recognized two types of struggling schoolchildren: "mental defectives," whose learning problems they said were innate, and merely "backward" children, whose problems they believed educators could correct. Leonard Ayres, the administrative progressive reformer who popularized the notion of "retardation" (or children over-age for the grades they were in), argued that most struggling children by far were merely backward. The nature of their learning problems was that they were impermanent, not owing to any innate deficiency. The causes were wide and varied, everything from bad teaching to poor pupil health, to children who switched schools too often because their parents were transient.<sup>19</sup> But Lewis Terman disagreed with Ayres on this interpretation. As Terman popularized IQ testing, he also argued for a major redefinition of the nature and cause of most learning problems. He said that they were permanent, inherent in the defective hereditary inheritance of the children who suffered from them. Refuting Ayres directly, Terman wrote in 1919 "the retardation problem is exactly the reverse of what it is popularly supposed to be."<sup>20</sup> Most struggling schoolchildren did not have temporary handicaps that could be lifted, he said. He asserted instead that the vast majority of learning problems were caused by inherent defects that could not be corrected. Terman ultimately won the debate and for a decade at least the nature and cause of most learning problems was slowly redefined through special education to align with his view.<sup>21</sup> True, this debate bore on the parameters of classification—as Kearl points out—but this was as much a discussion about what learning problems were and how teachers on the front lines in classrooms could hope to address them, if they could correct them or not.

<sup>18</sup> Jason Ellis, "'Inequalities of Children in Original Endowment': How Intelligence Testing Transformed Early Special Education in a North American City School System," *History of Education Quarterly* 53, no. 4 (November 2013): 401–29.

<sup>19</sup> Leonard P. Ayres, *Laggards in Our Schools: A Study of Retardation and Elimination in City School Systems* (New York: Russell Sage Foundation, 1909), 1–3. I expand on this important distinction in *Ibid.*, 406–9.

<sup>20</sup> Lewis M. Terman, *The Intelligence of Schoolchildren* (Boston: Houghton-Mifflin, 1919), 24–5.

<sup>21</sup> Ellis, *A Class by Themselves?*

All of this is not to say that the scholars who have heretofore theorized special education history have it wrong. My point is, rather, that the picture they paint is often incomplete because of a narrower than necessary focus. Historicizing special education's many features and functions reveals that it was simultaneously social uplift, social control, science, eugenic pseudo-science, a classification system, a set of theories about the nature and cause of learning problems, a collection of curricula and pedagogies, a way of legitimately and successfully treating very real learning difficulties, and fulfilled other objectives besides.

Historicizing special classes and programs will continue to reveal how these many objectives, some contradictory, could persist together at the heart of special education. What we do know is that they did. With a history like this, it is little wonder that we should continue to witness debates in special education today about inclusive versus separate settings, or about the true nature of disabilities—are they deficits to correct, or differences to celebrate? Appreciating special education's curious and contradictory past helps to explain its constantly contested present.



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*Education's Histories* would like to thank Jason Ellis for his multilogue response to Benjamin Kelsey Kearsley's essay, "Of Laggards and Morons: Definitional Fluidity, Borderlinity, and the Theory of Progressive Era Special Education (Parts 1 & 2)" and Donald Warren's multilogue response, "Escaping Befriended Circles."

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