
CRITICAL FACTORS OF THE POVERTY STRUCTURE IN FAMILIES UPBRINGING CHILDREN WITH DISABILITIES (PRE-UNDERSTANDING SITUATION IN THE REPUBLIC OF MOLDOVA AND UKRAINE)¹

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Introduction

The investigation of the problem of poverty in the families, in which children with disabilities are growing up, is a rather new area in contemporary social-political and scientific discourses in the new independent Eastern partnership countries, associated with the EU, such as Moldova and Ukraine (a.k.a. former Soviet Union Countries). Education, in a more general sense, and, special education, in a more narrow sense, are significant parts of these discussions. The scientific-practical experience of these sciences is strongly connected to this problem. It is sufficient to mention that the creation of the special education system in these countries is an integral part of the first social projects of the young Soviet country such as: "fight against poverty", "fight against illiteracy", "social motherhood" et al., the implementation of which was under strict ideological control². Furthermore, the policy of combating poverty had not received systematic development and had not become a part of the general economic and social policy of the Soviet Union. Milanovic³ explained this fact by the interpretation that the policy of poverty was considered as an "alien phenomenon" contradicting with the created ideal model of the state welfare system. Despite the fact that the system of monitoring in regard to poverty did not exist during this period, it is clear that some groups of the population of the Soviet Union, in fact, lived below the minimum income threshold⁴. In the Soviet Union, the needs of the families with low income (*maloimushije*) were rec-

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² **Kalinnikova L., Trygged S.** Retrospect on Care and Denial of Children with Disabilities in Russia// *Scandinavian journal on disability research*. 2014. Vol.16, issue 3, P. 229-248. URL: <http://www.tandfonline.com/loi/sjdr20> (дата обращения: 20.01.2014); **Калинникова Л., Магнуссон М.** Социальная политика в отношении детской «дефективности» в военно-революционный период и первую декаду советской власти (1914–1927 годы) // *Вестник САФУ*, 2015, № 1, с.157-166.

³ **Milanovic B.** Poverty, inequality and social policy in transition countries. Policy research Working Paper, № 1530. Washington, DC: The World Bank. 1995.

⁴ **Deacon D.** Eastern European welfare states. The impact of the politics of globalization// *Journal of European Social Policy*. Vol. 10. 2000. P 146-161; **Теодорович М. Л.** Бедность как социальная проблема: стратегический подход: Монография. Нижний Новгород, 2009.

ognized legally in 1974, when targeted cash transfers for such families were introduced⁵. Poverty, being legitimized by low, but stable living standards⁶, dependency of the ordinary person from the state, which was allocating resources in accordance to its own interests and values (suppressing or limiting the activity of the population in general), became objectified in social practices phenomena. "Equity in poverty" and transferring of the decision of the problem into the "bright future" was played back by the existing state welfare policy⁷.

Historically, the periods of the partnership of Moldova and Ukraine in the USSR differ. However, regardless of the circumstances of the historical time, the official ideology of socialism was implemented in all countries by the similar scenario, forming a common socio-economic and cultural context. The dominant role in this context the provision of the "citizen laborer as the most useful member of the society" and the main "beneficiary" of the public goods has played. This provision formed the basis of the principle of socialist humanism, which proclaimed the primacy a "new" human being: a fully developed human-worker brought up in a spirit of collectivism and dedicated to the idea of building of communist society. The maximum investment of human being physical and spiritual abilities for the benefit of society paves the way for communist ideals, when the "labor out of the main life tool became a vital necessity"⁸.

The official doctrine, in its main statements, extended to "defective" children, and was seen through the prism of the formation of their identity in accordance with the ideas of a new socialist society⁹. This thesis includes the idea that children with a new pedagogy and new methods of education can be "fixed / their development can be corrected" and that anyone can develop themselves in accordance with the ideals of the new society¹⁰. In these circumstances, children with developmental disorders were divided into "educable" (those who could be corrected) and "uneducable" (can't be corrected). This approach has led to a gradual isolation of both of the groups of the children from the society through the creation of a differentiated system of closed institutions. The functioning of these institutions was carried out by full state welfare support¹¹.

Parents of children with developmental disabilities, as well as parents of other children, in order to be able to fully participate in the building of the communist

⁵ Iarskaia-Smirnova E. & Romanov P. Single Mothers – Clients or Citizens? Social Work with Poor Families in Russia. In: Carlbäck, H, Gradskova; I. & Z. Kravchenko (Eds), *And They All Lived Happily Ever After? Norms and Everyday Practices of Family and Parenthood in Russia and Eastern Europe*. CEU press, 2012. P. 207-229.

⁶ Барсукова С. В. Самоидентификация "новых бедных" семей в процессе трансформации российского общества. Дис. ... канд. социол. наук : 22.00.04. Новочеркасск, 2005.

⁷ Теодорович М. Л. Указ. соч.

⁸ Большая Советская Энциклопедия. Гуманизм. М., 1969–1978. URL: <http://bse.sci-lib.com/article016819.html> (дата обращения: 20.01.2015).

⁹ Замский Х. История олигофренопедагогики. М., 1980.

¹⁰ Kalinnikova L., Trygged S. Retrospect on Care and Denial of Children with Disabilities in Russia// *Scandinavian journal on disability research*. 2014. Vol.16, issue 3, P. 229-248. URL: <http://www.tandfonline.com/loi/sjdr20> (дата обращения: 20.01.2014).

¹¹ Тенденция к изоляции детей с нарушениями развития от «всех остальных» была общемировой практикой первой половины XX века. Вместе с тем природа этого процесса имела различные корни и последствия для тех, кто нуждался в дополнительных ресурсах общества.

society, had a state promotion to be released from upbringing of their children. However, the choice of institutions for placement of a child with developmental disabilities, was significantly limited and carried out mainly on the small number of alternatives: either to send a child to a specialized kindergarten/school/internat or neurological internat (which often led to the rejection of a child upbringing later); or refusal to be employed (to a certain extent or completely) in favor of child care at home. Choices were usually varied depending on the place of residence of the family (urban or rural), and the choice was usually done internally.

It is believed that the official state ideology, along with various social institutions was involved in the formation of poverty rate¹². For this purpose, ideology used different mechanisms of control and legitimization of the appropriate practices¹³. For children with developmental disabilities and their families, "poverty rate" was manifested primarily in the low living standards not only for the disabled child, but for family members in general: poor social infrastructure assistance and segregation; limited conditions of an access to basic resources of society for a disabled child (health, education, entertainment, etc.), additional economic burden on the family and the problem of being successfully employed for parents etc.. According to numerous reports, this problem was accompanying the family and the growing child throughout the family life cycle, devaluing human resources in such families.

Systemic transformation processes taking place in the countries of the former Soviet Union, the transition to a market economy and liberalization, reducing the role of government control in various areas of the social sector and increased individual responsibility of each for the circumstances of his/her life, - increasing economic polarization in society and inequality among its members. In such circumstances, poverty for socially disadvantaged groups became an apparent reality.

The purpose of this article is based on the chosen research methodology to describe and analyze the critical factors of poverty in families, raising children with disabilities¹⁴.

The methodology of this study is based on the analysis of the issue of the relevant scientific literature, representing a fundamental (historical) perspective of the problem and contemporary publications. The main part of the analyzed publications consist of articles from the last ten years of international electronic scientific journal's bases: ERIC, Taylor and Frances, Scopus, EBSCO, and PsycINFO. Scientific articles were collected and selected in accordance to the research questions: How do the critical factors constitute the structure of poverty in families with children with developmental disabilities? Which of the critical factors are relevant to the study and the solution of the problem of poverty in these families for psychological and educational research? What is the role of special education in the structuring of poverty?

¹² Lewis, O. *The Culture of Poverty // Poverty in America* / Ferman, L. and others (Eds.): University of Michigan Press, 1965.

¹³ Foucault, M. Governmentality, in Rabinow, P. & Rose, N. (eds) *The Essential Foucault: Selections from Essential Works of Foucault 1954–1984*. London: The New Press. 2003.

¹⁴ In this article, the term "developmental disability" and "disability" complement each other, since not all children with disabilities receive a disability. However, both of these terms are used to refer to the soft, medium and severe disorders of the body, such as blindness, inability to walk, mental retardation, that resonates with the official definition of disability in the report of UNICEF "Children and Disability in Transition in CEE / CIS and Baltic States" for 2005, ppxii.

The analysis is based on the positions of the critical consideration of the problem of poverty in these families and the allocation of a number of critical factors that are the most influential on the occurrence of poverty among them. It is assumed that the critical factors involved in the formation and structuring of poverty are multidimensional by their nature. Each of the factors includes a number of sub-factors that are regulated by a complexity of relationships. For the analysis and interpretation of the critical factors of poverty in these families used interdisciplinary research model based on the use of sociological, educational, social and psychological approaches.

Critical factors of the structure of poverty among families with children with developmental disabilities

Critical factors of financial deprivation for families with children with developmental disabilities. The researchers with the focus on this area say that families with such children more often find themselves in situations of poverty and have far fewer resources to deal with it than the usual families. This position is supported by the theoretical approach of *human capital*. In the scientific literature, it is shown that raising a child with developmental disabilities is associated with a direct and an indirect additional economic burden on the family¹⁵.

Direct costs are directly related to the child's everyday needs related to his/her condition: changing and adapting home environment, establishing special equipment and furniture, clothing, medicine, expert assistance, treatment and rehabilitation aids, transport costs etc.. Indirect costs include financial implications associated with the redistribution of income in the family, as well as the employment of the parents. It is believed that if the indirect costs are not compensated through a system of formal (social benefits, insurance, social assistance institutions and special education, etc.) or informal support sources (extended family, charities, neighbors, friends, etc.), it is likely that they will have an impact on the frequency and the duration of the situations of poverty in these families¹⁶.

According to European and American researchers in the late 1990s, it was shown that the cost of a child with severe developmental disabilities, was at least three times higher than the average of such expenses when parents are upbringing a child without disabilities. In this case, everyone involved in the study of the family, received the maximum of the possible benefits for their situation. This fact raised the question of the need to increase the system of benefits for such families in the

¹⁵ **Lukemeyer A., Meyers M. K., Smeeding T.** Expensive children in Poor Families: Out-of-Pocket Expenditures for the Care of Disabled and Chronically Ill Children in Welfare Families // *Marriage and the Family*. 2000. Vol. 62. P. 399-415; **Shahtahmasebi S., Emerson T., Bertridge D., Lancaster G.** Child disability and Dynamics of Family Poverty, Hardship and Financial Strain: Evidence from UK // *Journal of Social Policy*. 2011. Vol. 40, 4, P. 653 – 673; **Parish S. L., Cloud J. M.** Financial Well-Being of Young Children with Disabilities and Their Families // *Social Work*. 2006. Vol. 51, 3. P.223-232.

¹⁶ **Lukemeyer A., Meyers M. K., Smeeding T.** Expensive children in Poor Families: Out-of-Pocket Expenditures for the Care of Disabled and Chronically Ill Children in Welfare Families // *Marriage and the Family*. 2000. Vol. 62. P. 399-415; **Shahtahmasebi S., Emerson T., Bertridge D., Lancaster G.** Child disability and Dynamics of Family Poverty, Hardship and Financial Strain: Evidence from UK // *Journal of Social Policy*. 2011. Vol. 40, 4, P. 653 – 673; **Parish S. L., Cloud J. M.** Financial Well-Being of Young Children with Disabilities and Their Families // *Social Work*. 2006. Vol. 51, 3. P.223-232.

range of 20% -50%, which should be provided in the provisions of social security. These studies have also shown that a significant number of cases have been reported about difficulties, which constitute the procedure to confirm the right on the benefits¹⁷.

To study the critical factors of financial difficulties for families with children with developmental disabilities, it is necessary to use different strategies or approaches of quantitative and qualitative research: *a subjective approach* (the family itself identifies costs or needs that are related to the problem of child development); *comparative approach* (actual patterns of the sample compared to the expenditure patterns of the control group [families who do not have children with developmental disorders]); approach "*standard of living*" (measures how income should be to raise a child with disabilities, keeping the living standard, adopted in the society); *budget standards approach* (takes into account details of the household budget "with" a child and "without", using differences in the budgets for the display of additional costs associated with the health problem of the child). Each of these approaches has its advantages and disadvantages, so researchers compliment them on the basis of their research methodology developed¹⁸.

Studying the critical factors of financial difficulties in the analyzed families, scientists are developing national research models. For example, there is a questionnaire for the study of California households with children or adults with disabilities (AFDC)¹⁹. AFDC²⁰ was established in the Department of Social Services at the University of California, and focuses on a comparative approach to the study of a number of indicators among families with children with developmental disabilities and those families who do not have such children. The questionnaire includes several sections: the specificity of the type of violation of a child's participation in social programs, demographic characteristics (education, ethnicity, human capital, family structure, etc.), material deprivation (specific family income, poverty rate, and various forms of monetary and non-monetary support etc.), employment, expenses etc., randomized sampling is recommended. Similar questionnaires are used in other countries. For example: FACS²¹ in England or HES²² in Australia.

Studies conducted on the basis of these questionnaires confirm significant additional financial burdens on the families because of the health problems of their children and that families are undergoing various hardships. At the same time, the studies emphasize that the costs which families are carrying have a variable value determined by the degree, depth, and sometimes the type of child developmental

¹⁷ Ward L. Supporting Disabled Children and their Families // *Children and society*. 1999. Vol. 13. P. 394-400.

¹⁸ Zaidi A. & Burchardt T. Comparing incomes When Needs Differ: Equivalisation for the Extra Costs of Disability in the UK // *Review of Income and Wealth*. 2005. Vol. 51, 1. P 89-114.

¹⁹ Lukemeyer A., Meyers M. K., Smeeding T. Expensive children in Poor Families: Out-of-Pocket Expenditures for the Care of Disabled and Chronically Ill Children in Welfare Families // *Marriage and the Family*. 2000. Vol. 62. P. 399-415.

²⁰ AFDC: Aid to Family Dependent Children

²¹ FACS: Family and Child Study. Shahtahmasebi S., Emerson T., Berridge D., Lancaster G. Child disability and Dynamics of Family Poverty, Hardship and Financial Strain: Evidence from UK // *Journal of Social Policy*. 2011. Vol. 40, 4, P. 653 – 673.

²² HES: House Expenditure Survey. Saunders P. The Costs of Disability and Incidence of Poverty // *Australian Journal of Social Issues*. 2007. Vol.42, 4. P. 461-480.

disorders. In a study, based on FACS, was noted that in families with children with mental retardation, the level of deprivation, which families are going through is much higher than in families with children with such as autism spectrum disorders. It is obvious that the state of poverty among families, raising children with disabilities, has an individual structure. There are still some open questions: What are the other characteristics of the family (size of the family capital/resources etc.) involved in the process of constructing poverty in these families? What is the specific role of the child disability constituting economic deprivation for the family?

Summing up the consideration of the critical factors of financial deprivation in studied families, concludes: "economic order" of the social welfare is controlled by the political system of the state responsible for the emergence of the "new poor" and the reproduction of poverty. Families raising children with disabilities by the key indicators of financial stress and deprivation have unequal economic situations compared with families, which upbringing ordinary children without disabilities²³. This also means that the low standard of living for the entire population will be reflected by double depletion in families with children with disabilities, securing them the status of "double poor"²⁴.

The critical factor of social "exclusion" and institutional practices of special education. This factor is reflected upon the socio-cultural inequalities of everyday experiences of children with developmental disabilities and their families. Embodied in the structure of the limitations (by size and forms) and segregated by its institutional practices nature, "social exclusion" is normalizing attitude to the "weak", designing the context of the life image of these families as a context of deprivation, where the human capital is impoverished and devaluated. As shown by current research, this factor is acting as a reproducing poverty factor. Special education, if it is implemented in the context of segregation, plays a critical role in shaping the social and cultural inequalities. A socio-cultural context of special education of the Soviet period was shaped by the principle of socialist humanism. Defectological science and practice developed under the ideological pressure of this principle, constructed "social exclusion". A social model of disability, which has been developed by Lev Vygotsky²⁵ at the beginning of the revival of the Defectology, was not destined to be implemented. A defectological educational model would solidify in the form of the "defectological square" lasting until the early 90s of the 20th century. Being inside of this "square", children with developmental disabilities and their families were deprived of support from both the church and philanthropic organizations. They were closed in a particular situation inside which special education was implemented²⁶.

²³ "...We should not forget also that children with disabilities are a diverse group with different needs and-just as importantly-these needs change, sometimes quite significantly, over the life cycle, as well as provided support"fromUNICEFreport: Children and Disability in Transitionin CEE /CIS and Baltic States. 2005. P.26.

²⁴ **Fujiura G. & Yamaki K.** Trends in demography of childhood poverty and disability // *Exceptional children*. 2000. Vol.66. P 187-199.

²⁵ **Выготский Л.** Коллектив, как фактор развития дефективного ребенка // *Вопросы дефектологии*, 1931, № 1-2, с. 8-17; № 3, с. 3-18.

²⁶ **Malofeev N.** Special Education in Russia: Historical Aspect.// *Journal of Learning Disabilities*. 1998. 31 (2): 181-185. doi: 10.1177/002221949803100208

Critically assessing the defectological educational model, we emphasize that it was formed gradually, science and practice of it were polished by the historical and cultural context of the Soviet period. The principle of the developed socialism "from each according to his/her ability, to each - according to his/her work"²⁷ had become a core to the rationing order to achieve communist ideals for each member of Soviet society (through labor), including children with developmental disabilities. The "Defectological square", became a symbolic result of the unrealized "utopia." In the new post-perestroika societies and the new economic circumstances, influenced by liberal political principles, the defectological educational model was no longer viable.

In Europe and other developed countries, institutional segregation practices have been the subject of critical debate over the past fifty years. For example, in the Nordic countries, successfully combining economic development with a sufficiently high level of prosperity, the discussion about the "School for All" has begun in the 60s of²⁸. All these years the undertaken discussion was never left without attention from the leading political parties and was a central theme of educational reforms within the applied period²⁹. During these years, educational policy documented recognition that all students differ in learning; school curriculum governed by the provisions that any abilities and learning needs of students should be met and taken into consideration, and that teaching can't be done by the same way for all³⁰.

Systematizing the analyzed research data, two main tendencies of the development of special education in the developed countries, relevant to the problem discussed in this article, have been identified.

The first tendency is the recognition that inclusive education is no longer an issue for compulsory education or special needs - it is rather a question of the right to participate in general education. It should be noted that there is a lack of comprehensive studies that would allow a more accurate assessment of levels of participation and the degree of involvement of children with disabilities in regular schools, including comparisons of their achievements in accordance with the form of education: special or regular training³¹. In some studies, it is emphasized that the inclusion has positive impact on the development of "self-concept" of students with special needs³²; that the social and academic development of students with special needs enrolled in regular classes, is more successful than in special classes³³. As a

²⁷ Конституция СССР 1936 года. <http://constitution.garant.ru/history/ussr-rsfsr/1936/>

²⁸ **Egelund, N, Haug, P & Persson, B.** Inkluder ande pedagogik i ett skandinaviskt perspektiv. 2006. Stockholm: Liber.

²⁹ **Isaksson J. & Lindqvist R.** What is the meaning of special education? Problem representations in Swedish policy documents: late 1970s -2014 // *European Journal of Special Needs Education*. Online publication: 22 January 2015.

³⁰ **Berhanu G.** Special education today in Sweden. *Special Education International Perspectives: Practice Across the Glob. Advances in Special Education*. 2014. Vol. 28. P. 209-241.

³¹ **Berhanu G.** Special education today in Sweden. *Special Education International Perspectives: Practice Across the Glob. Advances in Special Education*. 2014. Vol. 28. P. 209-241.

³² **Persson B. & Persson E.** Inkludering och måluppfyllelse – att nå framgång med alla elever. [Inclusion and goal attainment to achieve success to all pupils]. Stockholm, Sweden: Liber. 2012; **Westling Allodi M.** Self/concept in children receiving special support at school // *European Journal of Special Needs Education*. 2000. Vol. 15. P. 69-78.

³³ **Baker E. T., Wang M. C. & Walberg H. J.** The effects of inclusion on learning // *Edu-*

consequence of the situation, the importance of monitoring of inclusive/segregated processes in the education for children with developmental disabilities is becoming central and examples of "good practices" of inclusion and participation of children with special needs in the regular educational practices are becoming more and more frequent. Researchers, as in Sweden, have noticed that the development of inclusive education during recent years is influenced by two main factors: more and more parents exercise their right to choose their principal place for their children education; the work with such children in schools is becoming more and more individualized, underscoring the value of individuality in terms of human values of solidarity, dialogue, and equal opportunities³⁴.

Nevertheless, scholars argue that the comparison "inclusiveness" in accordance to the standards of what should be an inclusive education - this is one aspect of understanding the problem. "Inclusiveness" of different educational systems in inclusive education is another aspect of the problem³⁵. Educational practices for children with developmental disabilities are becoming more diverse and variable, and special education, despite the significant reduction in the number of special educational institutions or classes, continues to operate and is part of the inclusive education process.

The second tendency is increasing the number of students in special education institutions. Multiculturalism, cultural diversity is becoming an integral part of the standard compulsory education system of developed countries. As is well known, and emphasized in our research direction previously³⁶, there is a set of relations between the concepts of ethnicity, special educational needs, disability, gender, socio-economic factors, etc.. Researchers highlight (show this on the example of Sweden), that since 1992 to 2000, there is a process of a gradual increase of a number of students from migrant families at special schools: their knowledge is evaluated below average knowledge of their peers; they constitute a high drop-out rate in high school/secondary schools; they are representing the lowest number of students with the ambition to reach higher education³⁷.

Disproportionality composed by students of special schools and classes at the expense of increasing the number of students from socially disadvantaged groups and immigrants, is becoming an actual picture of the students composition at con-

tion leadership. 1995. Vol. 54, 4. P. 33-35; **Peetsma T., Vergeer M., & Karsten S.** Inclusion in education: Comparing pupil's development in special and regular education // *Education Review*. 2001. Vol. 53, 2. P. 125-135.

³⁴ **Göransson K., Nilholm C. & Karlsson K.** Inclusive education in Sweden? A critical analysis // *International Journal of Inclusive Education*. 2011. Vol. 15, 5. P.541 – 555.

³⁵ **Göransson K., Nilholm C. & Karlsson K.** Inclusive education in Sweden? A critical analysis // *International Journal of Inclusive Education*. 2011. Vol. 15, 5. P.541 – 555.

³⁶ **Калиникова Л.** Проблема человеческих ресурсов и социального капитала в малообеспеченных семьях, воспитывающих детей с нарушениями развития // "Материалы IX Східно- та Центральноєвропейської Регіональної конференції з проблем альтернативної та допоміжної комунікації «Комунікація для всіх»". Київ, 2013, с. 132-140.

³⁷ Between 1992 and 2001, the number of students with severe learning problems has risen to 67%, which means that about 200,000 students in Sweden received special educational support during schooling. While special education schools, enrollment was raised from 0.8%(1990)to 1.4% (2007-2008). From: Berhanu G. Ethnic minority pupils in Swedish schools: some trends in overrepresentation of minority pupils in special educational programs // *International Journal of Special Education*. 2008. Vol.23, 3. P.17-27.

temporary special educational institutions in Scandinavia and England³⁸. Researchers have linked this state to several factors. The *first* is that the determination of the level of learning in the case of mild mental retardation has strong methodological complexity. In this context it is very important to note that these children enter special schools after their failure to perform a fulfillment level of knowledge at compulsory school (it occurs during the period of schooling, what distinguishes these children from all the other children with mental retardation, whose retardation is observed at an earlier age). The *second* factor is related to the social situation of "ethnic minority", which are forced immigrants or fugitives (most often displaced persons from war areas). This social situation often creates conditions of poverty, which increase the risk factors of child development, which further affects the academic achievements during the school years, increasing the risk of the need for special educational support. The belonging to the ethnic minority becomes a kind of "guarantee" to get access to the system of special education³⁹.

Making a general conclusion for the discussed "critical factor of "social exclusion" and institutional practices of special education", as possible sources of poverty in families with children with developmental disabilities, we will stress that in this area special attention was paid to the social-cultural context of the special education institutional practices. Analysis based on the "defectological educational model" (the Soviet model of special education) and inclusive education, "School for All" (Scandinavian model of inclusive education), has shown that political reforms and the scientific knowledge play a crucial role designing the context of social exclusion/inclusion. Modern neo-liberal reforms, individual responsibility on the one hand, the lack of methodological scientific approaches in the field of special education on the other, lead to a disproportionality of students in special education institutions identified as a process of increasing the number of students from disadvantaged backgrounds and poor families, creating barriers to the system of compulsory education, limits the choices of professional education, constructs "underclass" and deprivation culture of poverty. Despite the fact that special education for many children serves as one of the major development environments, including special education in an inclusive process of education becomes essential. However, the overall picture of the relationships between inclusive and special education remains quite complex and problematic, further development of science and policy in this area deserves serious attention.

Critical factor of "human resources" and "family capital": confronting inequality⁴⁰.

³⁸ **Berhanu G.** Special education today in Sweden. *Special Education International Perspectives: Practice Across the Glob. Advances in Special Education*. 2014. Vol. 28. P. 209-241; **O'Connor & Fernandez S. D-L.** Race, Class and Disproportionality: Reevaluating the Relationship between Poverty and Special Education Placement // *Educational Researcher*. Vol. 35, № 6, P. 6–11.

³⁹ Существует целый ряд обстоятельств, которые затрудняют процесс «учения» у таких детей. На первом месте стоит социальный опыт детей, прибывающих в страну. Этот опыт приобретался в ином культурном и образовательном контексте, что становится существенным фактором их неуспеваемости в новых условиях обучения. Языковая грамотность становится следующим фактором, создающим высокий риск в обучении. В цели данной статьи рассмотрение таких факторов не является исследовательской целью; **O'Connor & Fernandez S.D-L.** Race, Class and Disproportionality: Reevaluating the Relationship between Poverty and Special Education Placement // *Educational Researcher*. Vol. 35, № 6, P. 6–11.

⁴⁰ This part of the article was primarily published in an article titled (Kalinnikova L.) "The

The theory of "human resources" is focused on explaining and understanding how families are confronting inequality, overcoming social and economic discrimination and poverty. The appearance of these theories in the 70s of the XXth century is relating to the general tendencies of rethinking "human values" in the developed societies of that time. "Human Resources" (HR) were an attempt to explain the scientific importance of the participation of each person in the economic life of the society, and to consider individual factors as an expression of "human capital"⁴¹. The scientific founder of the theory of the HR – T. Schultz and G. Becker received the Nobel Prizes for their "discovery" accordingly in 1979 and 1992. The main idea of this theory could be generally presented as a position, that people should be considered as a main value and wealth of the society; investing in people, their chances to make a worthy life choice is improving and this is one of the ways to improve the well-being of the humanity.

Gradually the theory has been built on a solid foundation of social and humanitarian knowledge. One of the most significant contributions to the theory of HR was the recognition that not only individual factors "human capital" raise the level of prosperity of the society and the chances of a decent standard of choice, an important role in these processes belongs to community resources, and, above all, family. Communities and families are also creating their capital, which allows their members to interact successfully with the world on the other side of their borders (especially children). Families in difficult life situations, having a family capital, are prepared to confront and meet "challenges" to dire life circumstances. Being mobilized, family capital, is participating in the redistribution and restructuring of family resources, strengthens support for family members; has an indirect impact on the services and agencies that are responsible for making decisions about the fate of family members; searches for information about the possibilities; helps participants to strengthen their identity. Finally, the "family capital", maintaining and growing out of the families, creates the conditions for access to the new social and economic resources⁴². Family capital is constructed from financial, cultural and social capital, playing a crucial role in maintaining the well-being of growing up children⁴³. Financial capital is made out of family income and the "wealth" of the family. Cul-

problem of human resources and social capital in low-income families with children with developmental disabilities" / Sat. Materiali IX Shidno-tat Tsentralno evopeyskiy Regionalnoy konferentsiis problems that alternativ edopomizhnoy kommunikatsii "Komunikatsiya forvsih" / ed. VN Sinova, MK Sheremet.-Kiev: DIA. 2013. pp 132-140. «Проблема человеческих ресурсов и социального капитала в малообеспеченных семьях, воспитывающих детей с нарушениями развития»/ сб. Матеріали IX Східно- та Центральноєвропейській Регіональної конференції з проблем альтернативної та допоміжної комунікації «Комунікація для всіх» / под ред. В. Н. Синьова, М. К. Шеремет.- Киев: ДІА. 2013. С. 132-140.

⁴¹ Schultz T. Investment in human capital // *American Economic Review*. 1961. 51 (1). P. 1-17; Becker, Gary S. Human Capital. N.Y.: Columbia University Press, 1964.

⁴² Belcher, J., Peckuonis, E. & Deforge, B. (2011) Family capital: implications for interventions with families // *Journal of Family Social work*. 2011. Vol. 14, P. 68-85; Van Eijk G. Does living in a poor neighborhood result in network poverty? A study on local networks, locality-based relationships and neighborhood settings // *Journal of Housing and the Built Environment*. Advance online publication. 2010. doi:10.1007/s10901-010-9198-1.

⁴³ Coleman J. S. Social capital in the creation of human capital // *American Journal of Sociology*. 1988. 94, P. 95-120; Coleman J. S. Foundation of social theory. Cambridge, MA: Belknap Press. 1990.

tural—based upon an education of the family members, and is considered as a powerful "chance to overcome poverty"⁴⁴. Social capital is accumulated as a result of the possession of strong social nets⁴⁵.

In families with low economic prosperity, social nets between family members and other people may have both negative and positive socioeconomic effects. In some cases, the mobilization of social capital can block family contacts with the "other/non-poor" families and generate dependent relationships within the family among its members. Such mobilization of social capital has a negative impact on family life and poverty reduction⁴⁶. Social capital can develop positively, embodied in the family traditions and rituals. By participating in the socialization of family members, social capital supports this process through a variety of "invisible" resources (material, human, social, linguistic, psychological and cultural), and contributes to its progress toward achievement and overcoming inequalities⁴⁷.

Discussing the problem of the HR in families with children with developmental disabilities, it is notable that the number of studies in this field is very limited. In those of them that were analyzed, it is stressed that at various life circumstances, the family is recognized as a primary and central source of care and support for its members. Attention is drawn to the fact that the primary resource of care and support, updated and distributed among its members is the symbolic expression of "family capital" (economic, cultural, social, etc.).

In families, raising children with disabilities, in comparison with conventional families, resources are generated and structured in terms of inaccessibility/limitation of certain elements of family capital individually. This introduces a number of features in the everyday life of families. It is believed, for example, that children and adolescents with developmental disabilities have experienced much less family resources available for them than their so-called normal peers could experience⁴⁸.

The primary support resource is also determined by the living conditions of children/adolescents with disabilities (in/outside the family). Here, the primary role is played by the size and composition of the family and how families use their social capital, preserving the old and creating new social connections. For example, parents, brothers and sisters of children/adolescents living in households are considered to be one of the main sources of social capital. The nature of these relations follows from the parent-child relationship with their mothers, so these connections are called "emotional" and "maternal", they are a decisive factor in the social adaptation of children/adolescents⁴⁹. In such families, the primary resource is fueled by infor-

⁴⁴ Field J. Social capital (2nd ed.) New York: Routledge. 2008.

⁴⁵ Bourdieu P. The forms of capital. In J.C. Richardson (Ed.), Handbook of theory and research for the sociology of education. New York: Greenwood Publishing Group. 1985. P. 241-258.

⁴⁶ Bourdieu P. The forms of capital. In J.C. Richardson (Ed.), Handbook of theory and research for the sociology of education. New York: Greenwood Publishing Group. 1985. P. 241-258.

⁴⁷ Swartz T. Family capital and the invisible transfer of privilege: Intergenerational support and social class in early adulthood // *New Directions for Child and Adolescents Development*. 2008. Vol. 119. P. 11-24.

⁴⁸ Bourdieu P. The forms of capital. In J.C. Richardson (Ed.), Handbook of theory and research for the sociology of education. New York: Greenwood Publishing Group. 1985. P. 241-258; Coleman J. S. Foundation of social theory. Cambridge, MA: Belknap Press. 1990.

⁴⁹ Kroese B., Hussein, H., Clifford, C., & Ahmed, N. Social support network and psychological well-being of mothers with intellectual disabilities // *Journal of Applied Research in Intel-*

mal networks of family support, the capital of which is actualized through the close relationships between family members. Those who live "outside the family" construct their nets out of the cooperation with specialists, their families and "co-residents" in co-accommodation. The nature of these relationships is "practical" and "emotional", limited by the structure of the "social care"⁵⁰. In such circumstances primary support of the accommodated outside of the family members is based on keeping contacts with the children through the formal institutional resources.

Earlier in the text, it was stressed that children with disabilities could bring certain instability in family functioning, putting additional stress for family members. And it doesn't matter how positive parents were describing their life situations, it is known that the presence of a child with developmental disabilities in the family, is affecting dynamics of the family life, reducing the quality of life of the family and its well-being⁵¹. Powerful source of an adequate primary care to its members in overcoming family disadvantage becomes a family "cultural capital" (parents' education, their self-esteem, ability to deal with difficult situations)⁵². Contradictory relationships between low levels of living, the financial burden and the need to take care of the child at home, affecting the ability of working family members to get permanent employment. This particularly affects the families of single mothers who have to frequently change or look for a job. They need flexible time-frames or part-time employment opportunities, to take work at home, or to look for other forms of employment. A characteristic feature of these families is the economic and social capital replenishment out of the resources of the extended family: parents and relatives (cousins of the child's parents and grandparents). It is believed that the older generation (rightfully) occupies a leading position in the family. Taking care of grandchildren, grandparents help their adult children, to maintain and extend these relationships⁵³.

In the attempt to determine the content of the social nets which are brought into the family with children with disabilities by the older generation, researchers have identified a number of significant features: "curb their emotions", "sacrifice", "supporting family relationships" and "the importance of the quality of life for families in the future." All of them emphasize that social nets with the older generation in the face of grandparents play an important role in the life circumstances of these families. Being extremely involved in the life of the family, grandparents contribute to emotional, instrumental and financial support to both "their own child" and "their grandson/granddaughter". Studies show that family functions and life level is supported by the significant contributions into the strengthening of the family relation-

lectual Disabilities. 2002. Vol. 15. P. 324-340.

⁵⁰ **Robertson, J., Emerson, E., Gregory, N., Hatton, C., Kessissoglou, S., & Hallam, et al.** Social networks of people with mental retardation in residential settings // *Mental Retardation*. 2001. Vol 39. P. 01-214.

⁵¹ **Калинникова Л., Магнуссон М.** Эмоциональные, поведенческие и когнитивные компоненты образа жизни семей, имеющих детей с тяжелыми нарушениями развития раннего возраста (анализ зарубежных исследований) // "Научный часопис. кореційна педагогіка та психологія.- 2010.- №13.- С.166-171.

⁵² **Fujiura G. & Yamaki K.** Trends in demography of childhood poverty and disability // *Exceptional children*. 2000. Vol.66. P 187-199.

⁵³ **Miller, E., Buys, L., & Woodbridge, S.** (2012). Impact of disability on families: grandparents' perspective // *Journal on Intellectual Disability Research*. 2012. Vol. 56. P. 102-110.

ships from the older generation. Grandparents develop a strong sense of responsibility and commitment, doing everything to preserve the family union members and family happiness⁵⁴.

Conclusions.

The present article had three research questions. The first question was aimed to find out the critical factors that constitute the structure of poverty in families upbringing children with developmental disabilities. The analysis of the fundamental and the contemporary research showed that the structure of poverty in these families is constructed of a number of factors (we have identified three main factors), which are multi-dimensional by their nature. Multidimensionality of each factor is manifested in the fact that each of them includes a number of sub-factors that exist at several levels: macro- (system control/governmentality), meso- ("social exclusion" and special education) and micro- (family), the relationships among the sub-factors have complicated regulations. All these factors have critical meaning for understanding the picture of the hardship and disaster (as a whole), which are leading the families with the children with disabilities to poverty. The dominant role is played by the macro- factor "governmentality"⁵⁵.

Critical factors of financial deprivation are controlled by "economic order" of a state social welfare and suggest that in terms of financial burden and deprivation in similar economic circumstances, families with children with developmental disabilities are at a disadvantage and symbolize the "double poverty " in comparison with conventional families.

The *critical factors of social "exclusion" and institutional practice of special education* show that a socio-cultural context of special educational practices can act as a source of poverty in families with children with developmental disabilities. Despite the fact that many special education placements for children with special needs, continue to be one of the most important contexts for their development, the inclusion of special education is an inclusive process is of paramount importance. However, the neo-liberal reforms, reducing the proportion of state control and increased individual responsibilities- on the one hand, the lack of fundamental methodology research in the field of special education - on the other hand, lead to disproportionality of students in special education institutions by increasing the number of students from disadvantaged and poor families that creates barriers to the system of general education for them, limits their choices of professional education, constructs "underclass" and poverty culture of deprivation.

Critical factor "human resources" and "family capital": confrontation inequality, is introduced as an important phenomena of the family construction, playing a significant role in understanding and overcoming poverty in those families with children with developmental disabilities. Different types of "family capital" (in its symbolic forms of social, cultural, educational, etc.) are redistributed within the family, and become a primary source of support to the family members.

The second question was addressed to those critical factors that are relevant

⁵⁴ Miller, E., Buys, L., & Woodbridge, S. (2012). Impact of disability on families: grandparents' perspective // *Journal on Intellectual Disability Research*. 2012. Vol. 56. P. 102-110.

⁵⁵ Foucault, M. Governmentality, in Rabinow, P. & Rose, N. (eds) *The Essential Foucault: Selections from Essential Works of Foucault 1954–1984*. London: The New Press. 2003.

psychological and educational research. The answer to this question was discussed in terms of the critical role of segregated special education contexts, as well as closeness and inaccessibility of families when they are in a poverty situation. Research in this area is extremely small.

However, for the classic psycho-pedagogical knowledge areas, such as: the impact of social environment on children's development and parent-child relationship; study of psychological and pedagogical resources of poor families and their dynamics during different life cycles; economic education, career guidance and employment of graduates of special educational institutions in the conditions of neo-liberal reforms of education and the market; scientific basis and the creation of groups of psychological and educational assistance for families and etc. - remain relevant to the study.

Finally, the third question: what is the role of special education in the structuring of poverty? The answer is partly given when there was an analysis of the answer to the first research question. We have emphasized that if the special education is embodied in the practices of segregation, these practices will create a context of deprivation of the lifestyles for children and their families, impoverishing "family capital" and devaluing "human resource" in these families; will play a critical role in shaping the socio-cultural inequalities and will participate in poverty reproduction in these families.

This study cannot claim completeness. For example, the structure of the critical factors of poverty can be significantly enhanced, and be organized on a different methodological basis. Several theoretical approaches to the problem of poverty reduction were not analyzed because it was not the main goal of this study. The investigation of the problem of poverty in families with children with developmental disabilities is continuing (based on Moldova and Ukraine case).

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Key words: *children with developmental disabilities; families with children with developmental disabilities; poverty; critical factors*

ԼԻԱ ԿԱԼԻՆՆԻԿՈՎԱ-ՄԱԳՆՈՒՍՈՆ – Ջարգացման խանգարմամբ երեխաներով ընտանիքներում աղքատության կրիտիկական գործոնները (Մոլդովայի և Ուկրաինայի հանրապետություններում իրավիճակի նախընթացման փորձ) – Հոդվածում ներկայացված են զարգացման խանգարմամբ երեխաներով ընտանիքներում աղքատության կրիտիկական գործոնների և նրանցում հատուկ կրթության դերի ուսումնասիրությանն ուղղված հետազոտության արդյունքները: Խորհրդային ժամանակների գաղափարախոսությունն օրինականացնում էր «աղքատության հավասարությունը» կյանքի ցածր, բայց կայուն ստանդարտների միջոցով: ԽՍՀՄ փլուզումից հետո պետական ռեֆորմների ազատականացումը մեծացրեց հասարակության մեջ տնտեսական բևեռացումը: Ջարգացման խանգարումով երեխաներ դաստիարակող ընտանիքների համար աղքատությունը դարձավ ակնհայտ: Հենվելով գիտական տեքստերի հիմնարար և ժամանակակից ուսումնասիրությունների արդյունքների վրա և

կիրառելով միջմասնագիտական մոտեցում, հոդվածում առանձնացվել է կրիտիկական երեք գործոն՝ «ԿԳ», որոնք կառուցվածքայնացնում են աղքատությունը նման ընտանիքներում. ֆինանսական անբարեհաջողության ԿԳ, սոցիալական «բացառման և հատուկ կրթության ինստիտուցիոնալ պրակտիկայի» ԿԳ, «մարդկային ռեսուրսների և ընտանեկան կապիտալի» ԿԳ: ԿԳ-ներն իրենց բնույթով բազմաչափ են: Յուրաքանչյուր գործոնի բազմաչափությունը դրսևորվում է նրանում, որ նրանցից յուրաքանչյուրը ներառում է մի շարք ենթագործոններ, որոնք միաժամանակ առկա են տարբեր մակարդակներում. Մակրո- (կառավարման համակարգ), մեզո- (սոցիալ-մշակութային և հատուկ կրթություն), միկրո- (ընտանիք), որոնք միմյանց հետ կապված են բարդ կապերով, և առանձնահատուկ ձևով կառուցվածքայնանում են յուրաքանչյուր ընտանիքում: Այդ բոլոր գործոնները կրիտիկական նշանակություն ունեն զարգացման շեղումով երեխաներ ունեցող ընտանիքների դժբախտությունների և գրկանքների ամբողջական պատկերը հասկանալու համար: Գերիշխող դերը պատկանում է մակրո- կարգի ենթագործոնին՝ կառավարման համակարգին: Հատուկ կրթությունը Մոլդովայում և Ուկրաինայում արմատավորվել է խորհրդային «դեֆեկտոլոգիական կրթական մոդելում», որը երկար ժամանակ նորմավորվում էր սոցիալիստական հումանիզմի սկզբունքով՝ կառուցելով սոցիալական բացառման համատեքստը «դեֆեկտոլոգիական քառակուսու» ձևով, որը դարձավ չիրականացված «ուտոպիայի» սիմվոլիկ արդյունքը: Դրա հետ միասին եվրոպական կրթության մեջ ներառական գործընթացները՝ պայմանավորված նեոլիբերալ ռեֆորմներով, և նոր տեսական մտածողության պակասը, նոր խնդիրներ առաջադրեցին աղքատության կառուցվածքայնացման և վերարտադրության գործում հատուկ կրթության տեղի և դերի մասին:

Բանալի բառեր – զարգացման խանգարումով երեխաներ, զարգացման խանգարումով երեխաներ դաստիարակող ընտանիքներ, աղքատության կառուցվածք, կրիտիկական գործոններ

ЛИЯ КАЛИННИКОВА-МАГНУССОН – Критические факторы бедности в семьях с детьми с инвалидностью (ситуация в Молдове и Украине). – В статье исследуется структура бедности в семьях, имеющих детей с нарушениями развития, и роль специального образования в их воспитании. Советская идеология легитимизировала «равенство в бедности» – низкие, но стабильные жизненные стандарты. Либеральные реформы после распада СССР усилили материальную поляризацию в обществе. Бедность для семей, воспитывающих детей с нарушениями развития, стала привычной реальностью. На основе современных исследований в статье выделены три критических фактора (КФ), структурирующих бедность в таких семьях: *КФ финансового неблагополучия; КФ социального «исключения» и институциональной практики специального образования; КФ «человеческих ресурсов» и «семейного капитала».* КФ многомерны по своей природе, каж-

дый из них включает ряд подфакторов, существующих одновременно на нескольких уровнях – макро- (система управления/governmentality), мезо- (социально-культурное и специальное образование) и микро- (семья). С их помощью складывается целостная картина лишений, приводящих такие семьи к бедности, причём доминирующая роль принадлежит системе управления. Спецобразование в Молдове и Украине коренится в советской «дефектологической образовательной модели», конструировавшей контекст социального исключения. Вместе с тем инклюзивные процессы в европейском образовании, обусловленные либеральными реформами, поставили новые вопросы о роли специального образования в структурировании и воспроизводстве бедности.

Ключевые слова: *дети с нарушениями развития; структура бедности; критические факторы*