

*Exceptional Teachers Teaching Exceptional Children*

# **NASET** **SPECIAL EDUCATOR** **E-JOURNAL**

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## Special Education Legal Alert

Perry A. Zirkel

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This month's update identifies two recent court decisions addressing various FAPE issues, including the foundational role of evaluations and, in the second case, the overlay of Section 504. For related publications and earlier monthly updates, see [perryzirkel.com](http://perryzirkel.com).

**On June 2, 2022, the Fifth Circuit Court of Appeals issued an officially unpublished decision in *Heather H. v. Northwest Independent School District*, addressing the issue of IDEA eligibility evaluation. Upon enrolling their child for kindergarten for the 2018–19 school year in Texas, the parents requested that the school district evaluate him for special education eligibility and provided a private psychological evaluation that diagnosed him with Autism Spectrum Disorder, Generalized Anxiety Disorder, and separation anxiety. Upon completion of the evaluation, which focused on autism, the multi-disciplinary team determined that the child did not qualify for IDEA services. Disagreeing with the determination, the parents requested an independent education evaluation (IEE) at public expense. The district denied their request and filed for a due process hearing. The parents then arranged for the IEE, which concluded that the child was eligible for special education under the IDEA classification of emotional disturbance (ED). After conducting the hearing, the hearing officer ruled that the district's evaluation was appropriate, thus declining to order reimbursement of the IEE. The parents filed an appeal with the federal district court, which affirmed the hearing officer's decision. The parents next filed an appeal with the Fifth Circuit.**

Upon appeal, the parents' first claim was that the district violated the IDEA requirement to evaluate the child "in all areas of suspected disability" by not specifically extending the evaluation's focus beyond autism to ED.

The Fifth Circuit rejected their claim, concluding that (a) the district did not have reason to suspect ED because the kindergarten teacher credibly testified that in the school setting the child did not manifest the anxiety diagnoses, being instead

	well within the range typical for kindergartners, and, in any event, (b) the evaluation included the BASC-3, which assessed his behavior and emotional functioning.
Alternatively, the parents claimed that the district’s evaluation should have assessed autism via the ADOS-II rather than the CARS-2 and the SRS-2.	The Fifth Circuit also rejected this claim, concluding that in the absence of IDEA statutory or regulatory criteria beyond general standards for technical soundness and lack of specific evidence of violations of these standards, the school district’s selection of evaluation tools is entitled to judicial deference.
Next, the parents claimed that the district violated the IDEA requirement to follow the publisher’s instructions for administering the instruments.	The Fifth Circuit found the evidentiary support for this claim limited to the failure to obtain the teacher’s input in the administration of the SRS-2, but without accompanying specifics as to either the publisher’s instructions or clear violations.
Finally, the parents claimed that the IDEA regulation for IEEs required the district also to prove that the IEE was not appropriate.	The Fifth Circuit pointed out that the applicable regulations required the district to show that its evaluation was appropriate “or” that the IEE did not meet these same criteria.
This decision is the most recent illustration of the general pro-district trend of court decisions specific to district evaluations/ reevaluations and IEEs under the IDEA. Nevertheless, readers should continue to keep in mind the distinction between minimum legal requirements and proactive professional best practices.	

A cluster of court decisions in *Doe v. Portland Public Schools* from July 2020 to July 2022 addressed the IDEA and Section 504 claims of the parents of a fourth grader, who struggled with reading and writing since kindergarten. Despite the parents’ repeated expression of concerns, the school district did not evaluate him until the start of second grade (2017–18). In December, the multi-disciplinary team determined that he was not eligible under the IDEA and should instead receive response to interventions (RTI) services. In grade 3 (2018–19), the parents obtained an evaluation at a local private school that specialized in learning disabilities. This private evaluation yielded a diagnosis of dyslexia. Starting in May 2019, the parents unilaterally placed the child for part of each school day in Lindamood-Bell tutorials at this private school. For grade 4 (2019–20), the parents unilaterally placed him in another private school full-time, while also arranging for private supplemental Lindamood-Bell tutorials twice a week. In fall 2019, the school district conducted another evaluation, concluding that he qualified under the classification of specific learning disabilities (SLD). In January 2020, the district proposed an IEP that provided for 70% in general education with accommodations and 30% for separate specialized instruction in the parents’ choice among the district elementary schools. Dissatisfied with both the IEP and the second private school, they unilaterally moved the child back to the original private school. They filed for a due process hearing, seeking reimbursement as compensatory education from December 2017 to December 2019 and tuition reimbursement along with prospective placement at this private school for the subsequent period. The hearing officer ruled in their favor for the first period based on the district’s ineligibility determination but concluded that the district’s proposed IEP was appropriate, thus limited the remedy to the FAPE denial in the first period. The parents appealed the ruling specific to the district’s proposed IEP and also separately sought relief under Section (§) 504.

The parents’ initial claim was that they were entitled to continued placement at the first private school as the stay-put.

In a decision in July 2021, the district court agreed, but in March 2022 the First Circuit reversed, concluding that the hearing officer’s decision, representing the state’s agreement, was expressly limited to the first period without any

	approval of the private placement.
Undaunted, the parents proceeded with their appeal regarding the district’s proposed IEP, claiming it should have provided for grade-level progress and more specially designed instruction.	On July 14, 2022, the federal district court ruled that the proposed IEP met the <i>Endrew F.</i> standard, which did not require grade-level progress and which provided for sufficient support in both general and separate classes, while also being in accord with the least restrictive environment. The court also concluded that the IEP was reasonably calculated to address his specific reading deficits without specifying the particular methodology.
The parents also proceeded with their separate claim of disability discrimination under § 504. The district replied with a motion for summary judgment, contending that the IDEA claim precluded the concurrent § 504 claim and, in any event, that the district did not engage in the § 504 prerequisite of “disability-based animus,” such as deliberate indifference.	Also on July 14, the federal district court issued a separate decision on the parents’ § 504 claim. First the court concluded that although the IDEA and § 504 claims overlapped, the parents sufficiently elicited evidence of the separable additional element of disability-based animus. Second, the court concluded that a jury could reasonably either accept or reject the following evidence of this required addition for § 504 discrimination: (a) the admission by the school psychologist for the first evaluation that she has a “bias of let’s not disable kids” in close cases, instead for trying RTI; (b) the hearing officer’s finding that the original eligibility determination was not a close case; and (c) the independent assessment of the parents’ expert that the data from the first evaluation clearly evidenced SLD eligibility.

This case illustrates the potential unpredictability and ponderous process of IDEA litigation of both eligibility evaluations and IEP formulations, but also the tricky overlap with § 504, which in occasional cases may pose a viable path to additional relief for plaintiffs.

## Buzz from the Hub

All articles below can be accessed through the following links:

<https://www.parentcenterhub.org/buzz-aug2022-issue1/>

<https://www.parentcenterhub.org/buzz-july2022-issue2/>

<https://www.parentcenterhub.org/buzz-june2022-issue2/>

<https://www.parentcenterhub.org/buzz-2022-may/>

<https://www.parentcenterhub.org/buzz-april2022-issue1/>

### **Providing Required Compensatory Services That Help Students with Disabilities in Response to the COVID-19 Pandemic**

This July 27th webinar, hosted by Office for Civil Rights (OCR) and OSERS, is a great way to learn when a school district must provide compensatory services under Section 504 and the IDEA to students with disabilities who did not receive the services to which they were entitled due to the pandemic. How to do so is also discussed.

### **Back-to-School: Tips for Parents of Children with Special Needs**

LDOnline offers 8 back-to-school tips for parents that emphasize communication, organization, and staying up-to-date on special education news.

### **The Promise and the Potential of the IEP**

The Spring-Summer issue of *The Special EDge Newsletter* is full of articles on the IEP, such as:

*Strength-based and Student-focused IEPs;*

*Improving the IEP: The Parent and Family Perspective;*

*Collaboration and the IEP;* and

*What I Learned That Can Help Others*, written by a youth speaking for those who cannot.

### **Prepararse para una reunión de IEP**

This 7-minute video in Spanish describes how parents can prepare for an upcoming IEP meeting.



### **Tools for Tough Times**

Much has been said and written about the importance of supporting the mental health of students returning to school in such turbulent times. Now youth speak for themselves in 30 two-minute teen-led videos. They show us all what steps they're taking to cope with the isolation, anxiety, and uncertainty they're feeling. You don't need to be a teen to benefit from the tools they describe.

### **Adapted PE for Your Child? Dear Parents**

Adaptability.com has some information to offer parents on Adapted Physical Education and the rights they have, given that adapted PE is a federally mandated special education service.

**An Action-Packed Year for Parent Centers** | Here's the infographic CPIR produced with the data you submitted. It's 2 pages (designed to be printed front/back to become a 1-page handout or mini-poster). It's a stunning portrait of what can be achieved by a few, extremely dedicated people for the benefit of so many.

**Adaptable Infographic for Parent Centers to Use** | This infographic is designed so you can insert just your Center's numbers, data results, and branding into key blocks of information. Adapt the PowerPoint file, and shine the spotlight on the work of your Center!

**Quick Guide to Adapting the Infographic** | This 2-page guide shows you where to insert your Center-specific information, just in case having such a "checklist" would be helpful.

### **PTAs Leading the Way in Transformative Family Engagement**

(Also available in Spanish: **Las PTA lideran el camino en la participación familiar transformadora**)

Drawing from research findings and best practices for family-school partnerships, this 11-page resource explains the guiding principles of the 4 I's of transformative family engagement (inclusive, individualized, integrated, impactful) and shares strategies local PTAs can use as a model to implement these principles in their school community.

### **Summer and Sensory Processing Issues**

(Also available in Spanish: ***El verano y los problemas de procesamiento sensorial***) | Why can summer be a difficult time for kids with sensory processing issues? What can parents do to help kids stay comfortable in overstimulating outdoor activities?

### **Ideas to Engage Students with Significant Multiple Disabilities in Activities During the Summer Holidays**

Here are fun ideas for summer activities for children with significant multiple disabilities and visual impairment, including sensory trays, art activities, books, music, and toys.

*Two more, with titles speakin for themselves?*

### **Babies and Toddlers Indeed!**

This landing page serves as a Table of Contents and offers families and others many options to explore, including an overview of early intervention, how to find services in their state for their wee one, parent rights (including parents' right to participate), the IFSP, transition to preschool, and much more.

### **Just want an quick step-by-step overview of early intervention?**

To give families the “big picture,” share the 2022 update *Basic Steps of the Early Intervention Process* with families.

### **For Spanish-speaking families**

CPIR offers a landing page called *Ayuda para los Bebés Hasta Su Tercer Cumpleaños*.

Beginning there, families can read about early intervention, the evaluation process for their little one, writing the IFSP, and the value of parent groups and suggestions for where to find them.

### **10 Basics of the Special Education Process under IDEA**

*In Spanish (**Sobre el proceso de educación especial**)*

**Your Child's Evaluation** (4 pages, family-friendly)

*In Spanish ([La evaluación de su niño](#))*

**Parent Rights**

*In Spanish ([Derechos de los padres](#))*

Landing page, again, this time to a simple list of each of the parental rights under IDEA, with branching to a description about that right. Surely a bread-and-butter topic for parents!

**All about the IEP Suite**

*([Similar info about the IEP in Spanish](#))* The landing page gives you and families numerous branches to explore, beginning with a short-and-sweet overview of the IEP, a summary of who's on the IEP team (with ever-deepening information below and branching off), the content of the IEP (brief summary first, then in-depth discussion thereafter), and what happens with the IEP team meets.

**Placement Issues**

*([Basic info about placement in Spanish](#))* Again, start with the main landing page for this bread-and-butter topic. Take the various branches, depending on what type of info the family is seeking at the moment. Branches include: a short-and-sweet overview to placement, considering LRE in placement decisions, school inclusion, and placement and school discipline.

**CPIR Resource Collections and Info Suites**

The resources listed above cover just a few of the topics that Parent Centers often address. For a more robust index of key topics, try the *Resource Collections and Info Suites* resource, which will point you to where other resources on key topics are located on the Parent Center Hub.

**Advancing Equity and Support for Underserved Communities**

In keeping with President Biden's Executive Order, signed on his first day in office, federal agencies have now issued Equity Action Plans for addressing equity issues in their individual agency scope and mission. These plans are quite relevant to family-led and family-serving

organizations, especially plans from the Departments of Education, Justice, and Health and Human Services.

### **Fast Facts: Students with disabilities who are English learners (ELs) served under IDEA Part B**

OSEP's *Fast Facts* series summarizes key facts related to specific aspects of the data collection authorized by IDEA. This newest *Fast Facts* gives you data details about students with disabilities who are also English learners. (Want to see what **other** *Fast Facts* are available?)

### **Asian Americans with Disabilities Resource Guide**

The *Asian Americans With Disabilities Resource Guide* was designed for Asian American youth with disabilities, allies, and the disability community in mind, in response to the significant information gap about Asian Americans with disabilities. Chapters include Advocacy 101, Accessibility, Culture, Allyship, and Resources.

### **Strategies for Partnering on Culturally Safe Research with Native American Communities**

To identify strategies for promoting cultural safety, accountability, and sustainability in research with Native American communities, Child Trends assessed peer-reviewed and grey literature (e.g., policy documents and guidelines). Findings? To rebuild trust and improve health outcomes, research collaborations with Native American communities must be community-based or community-engaged, culturally appropriate, and recognize tribal sovereignty in the collection and use of data.

### **Understanding Screening**

This toolkit helps educators and parents learn about screening and how screening can help determine which students may be at risk for reading difficulties, including dyslexia. From the National Center on Improving Literacy.

### **Inside an Evaluation for Learning Disorders**

(Also available in Spanish: **Un vistazo a una evaluación para los trastornos del aprendizaje**)

If a child is struggling in school, the first step to getting help is an evaluation. A learning evaluation can give parents and the child's teachers valuable information about the child's

strengths and weaknesses. It can also reveal what kind of support would be helpful. A full evaluation is necessary for a child to be diagnosed with a learning disorder. To help parents understand the process, the Child Mind Institute and Understood.org teamed up to create this 20-minute video that walks us through the evaluation process.

## **Biden-Harris Administration Announces Final Student Loan Pause Extension Through December 31 and Targeted Debt Cancellation to Smooth Transition to Repayment**

The U.S. Department of Education (Department) announced a final extension of the pause on student loan repayment, interest, and collections through December 31, 2022. Borrowers should plan to resume payments in January 2023. While the economy continues to improve, COVID cases remain at an elevated level, and the President has made clear that pandemic-related relief should be phased out responsibly so that people do not suffer unnecessary financial harm.

To address the financial harms of the pandemic by smoothing the transition back to repayment and helping borrowers at highest risk of delinquencies or default once payments resume, the Department will provide targeted student debt cancellation to borrowers with loans held by the Department of Education. Borrowers with annual income during the pandemic of under \$125,000 (for individuals) or under \$250,000 (for married couples or heads of households) who received a Pell Grant in college will be eligible for up to \$20,000 in debt cancellation. Borrowers who met those income standards but did not receive a Pell Grant will be eligible for up to \$10,000 in relief. The Department will be announcing further details on how borrowers can claim this relief in the weeks ahead. The application will be available no later than when the pause on federal student loan repayments terminates at the end of the year. Nearly 8 million borrowers may be eligible to receive relief automatically because relevant income data is already available to the Department. The Department is also making available a legal memorandum regarding its authority for these discharges.

The Department is also proposing a rule to create a new income-driven repayment plan that will substantially reduce future monthly payments for lower- and middle-income borrowers. The proposed rule would protect more income from loan payments. It would cut in half—from 10% to 5% of discretionary income—the amount that borrowers have to pay each month on their undergraduate loans, while borrowers with both undergraduate and graduate loans will pay a weighted average rate. It would also raise the amount of income that is considered

nondiscretionary income and therefore protected from repayment. The rule would also forgive loan balances after 10 years of payments, instead of the current 20 years under many income-driven repayment plans, for borrowers with original loan balances of \$12,000 or less.

Additionally, the proposed rule would fully cover the borrower's unpaid monthly interest, so that—unlike with current income-driven repayment plans—a borrower's loan balance will not grow so long as they are making their required monthly payments. The plan would also simplify borrowers' choices among loan repayment plans. The proposed regulations will be published in the coming days on the Federal Register and the public is invited to comment on the draft rule for 30 days.

"Earning a college degree or certificate should give every person in America a leg up in securing a bright future. But for too many people, student loan debt has hindered their ability to achieve their dreams—including buying a home, starting a business, or providing for their family. Getting an education should set us free; not strap us down! That's why, since Day One, the Biden-Harris administration has worked to fix broken federal student aid programs and deliver unprecedented relief to borrowers, " said U.S. Secretary of Education Miguel Cardona. "Today, we're delivering targeted relief that will help ensure borrowers are not placed in a worse position financially because of the pandemic, and restore trust in a system that should be creating opportunity, not a debt trap."

Additionally, the Department is proposing long-term changes to the Public Service Loan Forgiveness (PSLF) program that will make it easier for borrowers working in public service to gain loan forgiveness. Specifically, the Department proposed allowing more payments to qualify for PSLF including partial, lump sum, and late payments, and allowing certain kinds of deferments and forbearances – such as those for Peace Corps and AmeriCorps service, National Guard duty, and military service – to count toward PSLF. These proposed regulatory changes build on the progress made with the temporary changes announced last year by the Department that expire on October 31, 2022. Since the start of the temporary changes, the Department has approved more than \$10 billion in loan discharges for 175,000 public servants. To apply for forgiveness or payments to count toward forgiveness under the temporary changes, visit the PSLF Help Tool.

The Department is also taking steps to reduce the cost of college for students and their families and hold colleges accountable for raising costs, especially when failing to deliver good outcomes to students. The Department has already re-established the enforcement unit in the Office of Federal Student Aid and recently withdrew authorization for the accreditor that oversaw schools responsible for some of the worst for-profit scandals. The agency will also propose to reinstate and improve a rule to hold career programs accountable for leaving their graduates with unaffordable debt. And the Department is announcing new steps to take action against colleges that have contributed to the student debt crisis. These include publishing an annual watch list of the programs with the worst debt levels in the country and requesting institutional improvement plans from colleges with the most concerning debt outcomes that outline how the college intends to bring down debt levels.

The Biden-Harris Administration will keep fighting to reduce the cost of higher education by working to make community college free and doubling the maximum size of the Pell Grant.



## **U.S. Department of Education Terminates Federal Recognition of ACICS, Enhances Federal Aid Program Participation Requirements for ACICS-accredited Colleges**

The U.S. Department of Education announced that colleges currently accredited by the Accrediting Council for Independent Colleges and Schools (ACICS) will now be required to fulfill additional operating conditions for continued participation in the federal student aid programs. This requirement follows U.S. Deputy Secretary of Education Cindy Marten's final decision to terminate federal recognition of ACICS.

Although ACICS is no longer a nationally recognized accrediting agency, the Department will provisionally certify ACICS-accredited institutions for continued participation in the federal student aid programs for up to 18 months from today, the date of the Deputy Secretary's final decision. This 18-month provisional certification period allows institutions time to seek accreditation from another nationally recognized accrediting agency.

During this period of provisional certification, the Department will require the ACICS-accredited institutions to comply with additional conditions that are designed to protect students and safeguard taxpayer dollars. These conditions include additional monitoring, transparency, oversight, and accountability measures. Only ACICS-accredited institutions that agree to these conditions may continue to offer federal student aid.

The Department's Federal Student Aid office will begin sending provisional program participation agreements (PPAs) to the affected institutions, which will have 10 calendar days to respond affirmatively to the new agreements to remain eligible to participate in federal student aid programs.

The additional PPA conditions establish strong protections for students and taxpayers, preventing ACICS-accredited institutions from establishing new programs or locations or enrolling new students who will be unable to complete the program by the end of the provisional period unless the institutions become accredited by a new nationally recognized agency.

Within 30 days, all ACICS-accredited institutions will be required to submit teach-out plans for helping students complete their academic programs elsewhere if necessary and submit information about recent and ongoing investigations to ensure the Department is aware of key risks in this new environment of reduced oversight. Other new requirements for ACICS-accredited institutions include:

- Submitting teach-out plans to ensure a path to completion for students in the event of closure;
- Providing enhanced disclosures to students regarding potential loss of federal student aid eligibility;
- Limiting enrollment of new students who would be unable to complete their program of study before the 18-month provisional period ended;
- Ceasing additions of new programs or locations that qualify for Federal student aid;
- Submitting monthly student rosters and a record retention plan; and
- Posting a letter of credit to protect against taxpayer losses associated with school closure.

ACICS no longer Recognized as Federal Aid "Gatekeeper"

In her decision letter, Deputy Secretary Marten wrote:

"Recognition by the Department must be reserved for agencies that adhere to high standards, just as accreditation by agencies must be reserved for institutions and programs that adhere to high standards. The regulations provide for conditional recognition for up to 12 months, the kind of latitude ACICS seeks on this matter, when an agency will remedy an instance of noncompliance in that time period. However, ACICS has already had multiple opportunities to achieve full compliance. ACICS was found noncompliant with 34 C.F.R. § 602.15(a)(2) as far back as 2016. Despite its professed improvements, the agency remained out of compliance in 2018, at which time it was given another opportunity to reach full compliance. Its continuing failure to reach full compliance with this criterion alone is a sufficient basis to terminate ACICS' recognition."

The Deputy Secretary's decision follows a several years-long process that began in 2016, with the Department's decision to cease recognizing ACICS. ACICS's appeal to have their recognition reinstated was denied by then Secretary of Education John B. King Jr. ACICS followed that

decision with a lawsuit against the Department. After a federal judge required ED to consider new evidence, then Secretary of Education Betsy DeVos reinstated ACICS in 2018.

ACICS currently accredits 27 schools that enroll nearly 5,000 students. When the Department ceased recognition in 2016, ACICS accredited 237 schools that enrolled 361,000 students.

Last June, the Department's Senior Department Official (SDO) agreed with the recommendations of accreditation staff and NACIQI to withdraw recognition of ACICS. In its February 2021 final staff report, the Department's accreditation staff found that ACICS failed to comply with federal recognition criteria, including monitoring of compliance of institutions and inadequate administrative capability. ACICS appealed the SDO's decision, and the matter was referred to Deputy Secretary Marten.

Deputy Secretary Marten's decision is the Department's final action. ACICS is no longer a nationally recognized accrediting agency and can no longer serve as a "gatekeeper" of institutional eligibility for federal student aid programs.

#### Strengthening Accreditation of Colleges and Programs

As gatekeepers to \$112 billion in annual federal student aid, nationally recognized accrediting agencies serve a vital role in ensuring quality for students and families and in protecting students and taxpayers. The Department oversees the accrediting agency recognition process, which determines whether agencies are reliable authorities on educational quality. Since February 2021, the Department has taken a series of steps to strengthen the accreditation process.

- **Releasing final analyses and recommendations for nationally recognized accrediting agencies under review.** All nationally recognized accrediting agencies must successfully complete a review process every five years. In February 2021, the Department began releasing the final analyses and recommendations developed by agency staff to provide greater transparency and ensure confidence in the Department's review process.
- **Reinstating Accreditor Dashboards.** In July 2021, the Department also reintroduced the Accreditor Dashboards and accompanying data files. The dashboards, first introduced in 2016, provide greater transparency to the public around student outcomes, equity, and

value to aid NACIQI in identifying areas for discussion, challenges in accreditor oversight, and inform their recommendations on recognition.

- **Ensuring high standards in accreditor review process.** In February 2022, the Department introduced a revised Accreditor Handbook to clarify expectations for agencies and ensure sufficient documentation in the public record for evaluating agencies for recognition, including on student achievement, actions taken against underperforming institutions or programs, and ensuring accreditors have adequate staff and resources to ensure quality, among other areas. The latest changes are intended to ensure accrediting agencies are holding institutions and programs to high standards.
- **Combating "Accreditor Shopping."** In July 2022, the Department issued guidance to help inform institutions and accrediting agencies about their responsibilities related to seeking a different accreditor. The guidance aims to prevent "accreditation-shopping," the practice in which some institutions seek out specific accrediting agencies with less rigorous standards to sidestep accountability from an accrediting agency that investigates practices or takes corrective action against an institution. The Higher Education Act and Department regulations provide protections for students and taxpayers against this behavior.

### Strengthening Institutional Accountability

In addition to strengthening the accreditation process, the Department has taken a series of steps to ensure that all students have access to a valuable postsecondary education, and all institutions are held accountable for poor outcomes. Recently proposed regulations and executive actions that aim to strengthen institutional accountability include:

- **Fortifying borrower defense to repayment and prohibiting mandatory arbitration.** Proposed regulations would create a fair path for borrowers to receive a discharge if their colleges lied to or took advantage of them. This includes allowing for group claims, eliminating overly strict limits on when borrowers can file a claim, expanding the type of misconduct that can lead to an approved claim to include aggressive and deceptive recruitment practices, and ensuring borrowers receive timely decisions about their claims. To curb predatory behavior by colleges, the Department

proposes a strong process for recouping the costs of such discharges from the college, running for at least six years following the borrower's last date of attendance at the school. The Department also proposes ensuring that borrowers whose schools take advantage of them be allowed their day in court. The proposal would prohibit colleges from requiring borrowers to sign mandatory pre-dispute arbitration agreements or class-action waivers.

- **Holding institutions financially responsible.** The Department has already demonstrated a commitment to increased accountability, including by requiring entities that operate private colleges, particularly those with potential risk factors, to sign the agreements between colleges and the Department and to assume joint responsibility for any liabilities. The change will further ensure colleges are held financially accountable for their conduct.
- **Increasing transparency in change-of-ownership transactions.** The Department recently sought to clarify the requirements and processes institutions must follow for change-of-ownership transactions to expand protections for students and taxpayers. The proposed regulations would clarify the definition of a nonprofit institution to prevent improper financial benefits to a former owner or other affiliate of a college. Additionally, institutions undergoing a change in ownership may also be required to provide additional financial protection or to comply with additional conditions to protect against the risk of the transaction.
- **Closing the 90/10 Loophole.** For-profit institutions have long been required by the Higher Education Act to obtain at least 10% of their revenue from sources other than federal student aid provided by the Department (e.g., Pell Grants and federal student loans). The American Rescue Plan Act requires that at least 10% of funds come from sources other than any federal education assistance—not just aid awarded by the Department. The proposed regulations would be a change from current practice, in which institutions can count federal student aid for veterans and service members to meet the 10 percent revenue test. These proposed regulations would codify this statutory change and ensure for-profit institutions do not aggressively target students who served our country.

The Department is currently drafting final regulations for these proposals in response to comments and feedback from the public.

## **U.S. Department of Education Invites Applicants for More Than \$6 Million in Project Prevent Grant Program Funds to Support School Safety**

The U.S. Department of Education is posting a Notice Inviting Applications for the Project Prevent Grant Program, which will award more than \$6 million to local educational agencies (LEAs) impacted by community violence. As part of the Biden-Harris administration's broader commitment to school safety and addressing youth mental health the Department will provide schools the necessary resources to combat community violence and ensure a safe learning environment for students, families, and educators. Following the signing of the Bipartisan Safer Communities Act, the Department will be announcing additional resources for schools in the weeks ahead.

Project Prevent grants will expand the capacity of LEAs to implement community- and school-based strategies to help prevent community violence and mitigate the impacts of exposure to community violence. With these funds, LEAs can increase their capacity to identify, assess, and serve students exposed to community violence, helping LEAs to (1) increase student access to mental health services; (2) support conflict management programs; and (3) implement other community- and school-based strategies to help prevent community violence and to mitigate the impacts of exposure to community violence. As the Department works to address opportunity and achievement gaps, Project Prevent will deliver more resources for communities in need.

“When our students are exposed to community violence and experience trauma, their learning, their mental health, and their overall wellbeing are affected. We must do everything in our power to prevent and address community violence and wrap our children in the supports and services that can help them overcome any barriers to their success,” said U.S. Secretary of Education Miguel Cardona. “The availability of these new federal dollars will be transformative for our children and our communities. Together, we can give every student—especially students who need the greatest supports—what they need to learn, grow, heal, and thrive.”

Research has demonstrated that community violence is a risk factor for facing an adverse childhood experience (ACE), such as abuse, neglect, witnessing violence, or having a family

member who is incarcerated, and has an impact on future violence and victimization in a community. ACEs can increase risk among children and youth to experience depression, anxiety, and post-traumatic disorders; have difficulty in, or disconnect from, school and the workforce; and engage in delinquency or violent acts, potentially perpetuating the conditions that contribute to a cycle of community violence.

Community violence is a significant public health, public safety, and community infrastructure concern nationwide and is a leading cause of death, injury, and intergenerational trauma for people in the United States. Community violence imposes enormous human, social, and economic costs, including disruption to employment and hindering a community's social and economic development.

The FY22 Project Prevent Grant Program has a focus on partnerships with community-based organizations to mitigate the impact of community violence on students and families implementing community and school-based strategies. Local educational agencies, or consortia of local educational agencies are eligible to apply for these grants. The Department is especially interested in programs that support children and youth from low-income backgrounds. With the right investments and supports, the impact of these experiences can be mitigated in ways that help our children and youth thrive.



## **Statement from Secretary of Education on National Center for Education Statistics' Data Showing Student Recovery Throughout the 2021-2022 School Year**

U.S. Secretary of Education Miguel Cardona released the statement below following the release of the National Center for Education Statistics' (NCES) June 2022 data that highlights an improvement in student performance and three-quarters of public schools offering summer learning and enrichment programs to help students catch up.

"When the Biden-Harris Administration came into office, we knew we had to take urgent action to get schools reopened, get students back on track, and make sure they had the mental health supports they needed. This data shows that through the efforts of this Administration, and with the strong partnership of school leaders, teachers, school staff, families, parents, and students across the country, students have made significant progress just over the course of the 2021-2022 school year," said Secretary Cardona. "Additionally, this data shows that school districts across the country are using American Rescue Plan funds to expand access to summer learning and enrichment programs, hire more school counselors, meet the mental health needs of students and educators, accelerate student learning, provide high-quality tutoring, and more. As we continue to move through recovery, we must work together to help students succeed by improving the education system so that our students are given every opportunity to achieve at much higher levels than March 2020 and truly thrive."

Key findings from the NCES school pulse panel include:

- 56 percent of public schools using high-dosage tutoring to support pandemic learning recovery with the most school leaders rating this strategy as extremely or very effective
- 75 percent of public schools offering summer learning and enrichment programs, with 33 percent of these schools reporting that they increased their summer learning and enrichment programs

- A double-digit drop in the percentage of students that schools are reporting are behind grade level in at least one subject (from the beginning to the end of the 21-22 school year)
- 72 percent of public schools offering mental health supports
- Nearly all public schools offering in-person learning

Through the American Rescue Plan (ARP), the Biden-Harris Administration is investing in evidence-based solutions that are driving academic recovery and providing additional mental health supports. Since education was disrupted in March 2020 due to the covid-19 pandemic, the Biden-Harris Administration has prioritized recovery for students through multiple efforts. In addition to providing \$130 billion in ARP funds for K-12 education to support the safe reopening of K-12 schools and to meet the needs of all students, the Biden-Harris Administration:

- **Launched the National Partnership for Student Success to recruit 250,000 new tutors and mentors.** The Department joined forces with leading education, youth development, and service organizations to launch the National Partnership for Student Success (NPSS), a new coalition that will support the expansion, launch, and improvement of high-impact tutoring, mentoring and other programs to make up for lost instructional time, and support student mental health and overall wellbeing. The NPSS follows President Biden's call for more tutors and mentors in the 2022 State of the Union Address to help students recover from the pandemic and thrive.
- **Launched the Engage Every Student Initiative.** To support summer learning and afterschool programs, the Department launched the Engage Every Student Initiative that will help communities utilize ARP funds, alongside other state and local funds, to ensure that every child who wants a spot in a high-quality out-of-school time program has one, whether through a high-quality summer or afterschool program.
- **Highlighted schools effectively supporting students and shared best practices.** The Department launched a campaign through the Best Practices Clearinghouse to highlight and celebrate evidence-based and promising practices implemented by states, schools, and school districts using ARP funds to support learning recovery, increased academic

opportunities, and student mental health. The updated Best Practices Clearinghouse is the next phase of the Safer Schools and Campuses Best Practices Clearinghouse that the Department launched in spring 2021, originally designed to share best practices around safely reopening schools, addressing inequities made worse by the pandemic, and providing summer learning and enrichment opportunities to help students get reconnected to their communities, peers, and educators.

- **Is awarding the first of nearly \$300 million the President secured through the Bipartisan Safer Communities Act and the FY2022 Omnibus Agreement to expand access to mental health services in schools.** By increasing the number of qualified mental health professionals in our schools, and thereby reducing the number of students each provider serves, this funding, which is being allocated to two critical programs, will meaningfully improve access to mental health services for vulnerable students. This week, the Department will begin the process of disbursing almost \$300 million Congress appropriated in FY22 through both the Bipartisan Safer Communities Act and the FY22 Omnibus to help schools hire more school-based mental health professionals and build a strong pipeline into the profession for the upcoming school year. The two critical programs are the Mental Health Service Professional Demonstration Grant Program and the School-Based Mental Health Services Grant Program.
- **Launched the National Parents and Families Engagement Council.** In order to empower parents and school communities with knowledge about how their schools are using and can use federal funds to provide the necessary academic and mental health supports, the Department launched the National Parents and Families Engagement Council to facilitate strong and effective relationships between schools and parents, families, and caregivers.
- **Made it easier for families and stakeholders to see how their states and school districts are using ARP funds** by requiring State Educational Agency and Local Educational Agency plans for using ARP Elementary and Secondary School Emergency Relief (ESSER) funds and making those plans accessible to the public through an interactive map.

- **Will continue to track progress in providing additional learning opportunities.** The Institute for Education Sciences, the Department of Education's statistics, research, and evaluation arm, will continue to use monthly surveys to track schools' continued progress in providing summer learning and enrichment, tutoring, and afterschool supports.

## **Fact Sheet: Biden-Harris Administration Announces Two New Actions to Address Youth Mental Health Crisis**

Our nation's young people are facing an unprecedented mental health crisis. Even before the pandemic, rates of depression, anxiety and suicidal thoughts among youth were on the rise. The pandemic exacerbated those issues, disrupting learning, relationships, and routines and increasing isolation—especially among our nation's young people. More than 40 percent of teenagers state that they struggle with persistent feelings of sadness or hopelessness, and more than half of parents and caregivers express concern over their children's mental well-being.

To address this crisis, President Biden put forward in his first State of the Union a comprehensive national strategy to tackle our mental health crisis, and called for a major transformation in how mental health is understood, accessed, treated, and integrated—in and out of health care settings.

Today, the Biden-Harris Administration announced two new actions to strengthen school-based mental health services and address the youth mental health crisis.

**1. Awarding the first of nearly \$300 million the President secured through the FY2022 bipartisan omnibus agreement to expand access to mental health services in schools.** Next week, the Department of Education will begin the process to disburse almost \$300 million Congress appropriated in FY22 through both the Bipartisan Safer Communities Act and the FY22 Omnibus to help schools hire more school-based mental health professionals and build a strong pipeline into the profession for the upcoming school year. In total, the Bipartisan Safer Communities Act will invest \$1 billion over the next five years in mental health supports in our schools, making progress towards the President's goal to double the number of school counselors, social workers, and other mental health professionals. This funding is allocated to two critical programs:

- **The Mental Health Service Professional (MHSP) Demonstration Grant Program.** In FY22, this program will provide over \$140 million in competitive grants to support a

strong pipeline into the mental health profession, including innovative partnerships to prepare qualified school-based mental health services providers for employment in schools.

- **School-Based Mental Health (SBMH) Services Grant Program.** In FY22, this program will provide over \$140 million in competitive grants to states and school districts to increase the number of qualified mental health services providers delivering school-based mental health services to students in local educational agencies with demonstrated need. This will increase the number of school psychologists, counselors, and other mental health professionals serving our students. Some schools will gain mental health staff for the first time. Others will see this critical workforce expand. By increasing the number of qualified mental health professionals in our schools, and thereby reducing the number of students each provider serves, this program will meaningfully improve access to mental health services for vulnerable students.

In the following months, the Biden Administration will deliver the following additional FY22 funding that can be used to expand access to mental health services and supports in schools:

- **Fostering Trauma-Informed Services in Schools.** Young people have been especially impacted by the trauma of COVID. Over the next several weeks, the Department of Health and Human Services (HHS) will begin evaluating applications to award nearly \$7 million to education activities designed to help students access evidence-based and culturally relevant trauma support services and mental health care. Applications were submitted on July 25, 2022, and award announcements will be made this fall. The grant funds will help create partnerships that link school systems with local trauma-informed support and mental health systems to provide services to students in need.
- **Expanding Mental Health Services Through Full-Service Community Schools.** The Biden-Harris Administration has proposed expanding funding for community schools, which play a critical role in providing comprehensive services to students and families to improve academic outcomes and student well-being. In response to the President's FY22 budget, Congress more than doubled funding for the Department of Education's Full-

Service Community Schools Program, which supports community schools that provide, or establish partnerships to provide, a range of wraparound supports for students and their families—including health, nutrition, and mental health services. Earlier this month, the Department announced plans to award \$68 million in funds for 40 new grantees. All grantees are required to provide integrated student services, which can include mental health services and supports.

- **Responding to Childhood Trauma Associated with Community Violence.** The FY22 omnibus included \$5 million for the Department of Education's Project Prevent, a program that provides grants to help school districts increase their capacity to implement community- and school-based strategies to mitigate community violence and the impacts on students. Experiencing or witnessing violence in the community is an adverse childhood experience linked to chronic health issues, including mental health. Project Prevent seeks to build a bridge between schools and community-based organizations to provide students with the tools to break cycles of generational violence and trauma, including through the use of mental health services and supports.

## **2. Encouraging Governors to Invest More in School-Based Mental Health Services.**

In a letter sent today to governors across the country, the Departments of Education and Health and Human Services highlight federal resources available to states and schools to invest in mental health services for students. The joint letter from Secretaries Becerra and Cardona highlights actions by the Biden-Harris Administration to improve the delivery of health care in schools and make sure children enrolled in Medicaid have access to comprehensive health care services, as required by law. The letter also previews forthcoming Medicaid guidance on how states can leverage Medicaid funding to deliver critical mental health care services to more students, including ways to make it easier to bill Medicaid for these services.

*Next Up: \$1.7 Billion for Mental Health Thanks to the Bipartisan Safer Communities Act*

An additional \$1.7 billion for mental health is headed to our schools and communities thanks to the Bipartisan Safer Communities Act (BSCA) signed by President Biden last month. Provisions of this legislation authorize funding and technical assistance in the following areas:

- **Expanding Community Based Behavioral Health Services.** \$40 million for HHS to support the Certified Community Behavioral Health Clinic (CCBHC) Medicaid Demonstration Program, including support for new planning grants to states. CCBHCs provide comprehensive, coordinated, person-and family-centered services and 24/7 crisis intervention services.
- **Enhancing Delivery of School-Based Mental Health.** Working with the Department of Education, HHS will establish a technical assistance center and award grants for implementing, enhancing, or expanding the provision of assistance through schools under Medicaid and CHIP.
- **Improving Oversight of Medicaid's Early and Periodic Screening, Diagnostic and Treatment Benefit.** HHS will review and identify gaps in state implementation of ESPDT compliance, provide technical assistance, and issue guidance to states in order to improve implementation of this critical benefit.
- **Increasing Access to Children's Mental Health Services.** \$80 million to HHS to award grants to support pediatric primary care providers, emergency departments, and schools to rapidly access mental health specialists' expertise and better connect children to care. The Act also requires CMS to provide guidance to states on how they can increase access to behavioral health through telehealth under Medicaid and CHIP.
- **Expanding Training for Pediatric Providers.** \$60 million, over five years, for HHS to train primary care residents in the prevention, treatment, and referral of services for mental and behavioral health conditions for pediatric and adolescents.
- **Supporting Community and First Responders Mental Health Training.** \$120 million for HHS to prepare and train community members and first responders on how to appropriately recognize and safely respond to individuals with mental health problems.
- **Building Awareness of and Access to Mental Health Services.** \$240 million for programs that increase awareness and access to mental health supports for school-aged



youth.

- **Providing Support after Traumatic Events.** \$40 million to improve treatment and services for children, adolescents, and families who have experienced traumatic events.
- **Enhancing the 9-8-8 Suicide and Crisis Lifeline.** \$150 million to support implementation of the 24/7 hotline to provide free and confidential support to people in suicidal crisis or emotional distress.
- **Improving Conditions for Student Learning.** \$1 billion in funding through Title IV-A to support a variety of activities to improve conditions for student learning through evidence-based practices to promote positive school climates.
- **Expanding Access to Out of School Programs.** \$50 million in funding to the 21st Century Community Learning Centers (21st CCLC) program to fund extracurricular, after school and summer programs, with a focus on reengaging youth. The Department of Education will support grantees in using funds to build relationships between students and educators, and other adults who serve students, in ways that help students feel less isolated and more connected to their school, improving their overall mental health and well-being.

### *Building on Progress*

These actions build upon earlier investments and announcements designed to expand access to mental health services for youth and further President Biden's Unity Agenda. In just 18 months, President Biden has invested unprecedented resources in addressing the mental health crisis and providing young people the supports, resources, and care they need. Through the American Rescue Plan (ARP), the Biden-Harris Administration has invested over \$5 billion in funding through HHS to expand access to mental health and substance use services, and school districts are estimated to use an additional \$2 billion in Department of Education ARP Elementary and Secondary School Emergency Relief funds to hire more school psychologists, counselors, and other mental health professionals in K-12 schools. And the President's FY23 budget proposes

over \$27 billion in discretionary funding and another \$100 billion in mandatory funding over 10 years to implement his national mental health strategy.

## **Examining General Education and Special Education Teacher Preparedness for Co-Teaching Students with Disabilities**

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### ***Abstract***

It is imperative to understand how teachers are prepared for their role as co-teacher. The purpose of this study was to investigate how general education and special education teachers in one elementary school in Georgia are trained in the instructional practice of co-teaching and their perceptions on how prepared they feel to implement the method. A mixed methods approach was used and included a qualitatively-oriented survey and semi-structured interviews. Data collected in this study revealed that over half of all co-teachers at the elementary school had received some type of training on co-teaching and also felt adequately prepared to serve in the co-teaching role. Overall, participants reported positive perspectives on co-teaching despite there being challenges. The benefits of co-teaching noted a supportive and safe environment, instructional support for students and teachers, and confidence builder due to collaboration. The challenges

reported included insufficient time for collaboration, inconsistent teaching schedules, and student behavior problems.

*Keywords:* co-teaching, teacher preparation, students with disabilities

## ***Examining General Education and Special Education Teacher Preparedness for***

### ***Co-Teaching Students with Disabilities***

Early on in the history of the United States, laws were made so that children with disabilities were often excluded from public education (Yell, 2016). As early as 1893 in Massachusetts, it was found that a child who was “weak in mind” could be considered a distraction to other children in the class and could, therefore, be expelled from the school. This view continued for decades and, even as recently as 1969, courts in North Carolina upheld this legislation that excluded students with disabilities from public education (Yell, 2016). In 1974, congressional findings revealed that “more than 1.75 million students with disabilities did not receive educational services” (Yell, 2016, p. 42). A pivotal change occurred in 1975 as President Gerald Ford signed into law the Education for All Handicapped Children Act (Public Law 94-142). With this law, children with disabilities were guaranteed a Free and Appropriate Education (FAPE) in the Least Restrictive Environment (LRE). Public Law 94-142 has been amended over the years and is now known as the Individuals with Disabilities Education Improvement Act (IDEA, 2004). Under the IDEA (2004), students with disabilities have the right to be educated in the LRE. This means that they are to be taught in the general education classroom alongside their peers to the greatest extent possible (Giuliani, 2012). Due to IDEA (2004), the trend of inclusion has become very prevalent in public education throughout our nation. In a report to Congress, The U.S. Department of Education (2018) noted that 63.1% of students with disabilities spent at least 80% of their school day in a regular education classroom. Because of this need to educate students with disabilities in the least restrictive environment, many public schools have turned to the model of co-teaching to fulfill this requirement (Murawski & Lohner, 2010).

Today's classroom teachers are faced with educating a more diverse population of students than in previous decades (Friend et al., 2010). With the prevalence of inclusion of students with disabilities into the general education classroom, new models of teaching need to be considered (Campbell & Jeter-Iles, 2017). One of these models is co-teaching. Co-teaching is a coordinated instructional practice that involves two teachers simultaneously providing instruction in a general education classroom to a group of students with diverse learning needs (Benninghof, 2012; Cook & Friend, 1995; Friend, 2008). Co-teaching is not a new idea. However, the increase in the use of this model is on the rise across our nation (Scruggs & Mastropieri, 2017). With this increase in use comes the need for an increase in understanding how to successfully implement a co-teaching model.

One of the essential factors for successful co-teaching is teacher preparedness (Chitiyo & Brinda, 2018). Co-teaching teams need training, guidance, and time for planning. They need to understand how to co-plan, co-teach, and co-assess. If teachers are not well-prepared for co-teaching, then numerous problems can occur in the implementation process, such as complications in classroom management styles between co-teachers or one teacher becoming the leader and the other acting merely as an assistant (Ploessl & Rock, 2014). Therefore, it is imperative to understand how teachers are prepared for their role as co-teacher.

Based on consensus from the field of experts that a lack of teacher preparation can be a hindrance to successful co-teaching (Brendle et al., 2017; Brinkmann & Twiford, 2012; Chitiyo, 2017), we, one special education teacher and three university professors, focused our attention on one case of 11 teachers who had experience with the co-teaching model. As a result, the purpose of this mixed method study was to investigate how general education and special education teachers in one elementary school in Georgia are trained in the instructional practice of co-teaching and their perceptions on how prepared they feel to implement the method. In this focus school, co-teaching occurs at every grade level (K-5) and every year the school struggles to answer the question of which teachers will serve as the inclusion teacher. Some general education teachers are hesitant to take on this role; thus, the school finds it hard to get volunteers. Because the first author is also an employee at the research school and served in a co-teaching capacity, the first author held a vested interest in understanding how to improve co-teachers' experiences in order to establish and maintain effective co-teaching relationships. These

relationships not only impact the teachers but also impact the students at the school. As a result, the study was both needed and significant in order to better understand the gaps that existed in teachers' training on co-teaching in this specific school context. The questions that guided this research project were:

1. What training do teachers receive on co-teaching?
2. How prepared do teachers feel in the use of co-teaching as an instructional model?
3. What do teachers see as the benefits and challenges to co-teaching?

### **Theoretical Framework**

This study was guided by the theoretical framework that teachers need to be trained in the practice of co-teaching in order for them to feel confident in their abilities to successfully execute the role of co-teacher and meet the needs of all students within a co-taught setting. This study draws on the Theory of Self-Efficacy by Albert Bandura (1977). As the practice of co-teaching varies, the self-efficacy to co-teach and implement effective instruction may also vary.

### **Theory of Self-Efficacy**

According to Bandura (1977), "an efficacy expectation is the conviction that one can successfully execute the behavior required to produce the outcomes" (p. 193). Bandura (1977) argued the level of a person's belief in their own effectiveness directly correlates to how hard they will work to cope with any given situation. When a person has perceived self-efficacy, they tend to set higher goals for themselves and work harder to achieve those goals (Zimmerman, et al., 1992). In this study, researchers identified how teachers were trained for co-teaching and their confidence in their ability to serve in the co-teaching role. When a teacher takes on a role such as co-teaching, there is an ever-evolving relationship between both the co-teaching partners and the teachers and students. In order to navigate these relationships and feel successful, one needs to have confidence in themselves to work through challenges that are encountered.

### ***Review of Literature***

With the purpose to examine the training that special education and general education teachers receive regarding co-teaching and their perceptions on how prepared they feel to implement the teaching strategy, the literature review first examines the models of co-teaching, followed by a discussion on the benefits and obstacles found with this often-used method of teaching. The literature review then addresses teachers' perceptions on their ability to implement co-teaching and their sense of preparedness.

#### **Understanding Co-Teaching as an Instructional Model**

Co-teaching offers a way for schools to meet inclusion mandates for LRE, as well as provide students with disabilities access to the general curriculum, making it an often-used model (Scruggs & Mastropieri, 2017). Co-teaching for this study is defined as a coordinated instructional practice that involves two teachers simultaneously providing instruction in a general education classroom to a group of students with diverse learning needs (Benninghof, 2012; Cook & Friend, 1995; Friend 2008).

There are six approaches to co-teaching: one teach-one assist, station teaching, parallel teaching, alternative teaching, team teaching, and one teach-one observe (Cook & Friend, 1995; Friend, 2007/2008; Friend & Bursuck, 2009). In the one teach-one assist model, two teachers are present during instruction, but one takes on the instructional responsibility while the other assists individual students as needed (Cook & Friend, 1995; Friend, 2007/2008). Station teaching involves co-teachers planning learning stations for students to rotate through, with the teachers providing instruction at two stations and the students independently completing the other stations (Cook & Friend, 1995; Friend, 2007/2008). In parallel teaching, lessons are co-planned by teachers and then each teacher delivers the same content to half the class (Cook & Friend, 1995; Friend, 2007/2008). Alternative teaching involves one teacher working with a small group of students while the other teaches the rest of the class. The small group may be used for pre-teaching or re-teaching a skill, assessments, special interests, or to challenge students. Team teaching allows teachers to co-lead the class. This might be by holding a discussion where each teacher takes an opposing view, modeling how to ask questions, illustrating different approaches to solving a problem, or one teacher lecturing while the other demonstrates the concept (Chitiyo & Brinda, 2018; Cook & Friend, 1995; Friend, 2007/2008). The one-teach, one-observe model

has one teacher leading instruction while the other takes data on a specific student or the whole class (Friend, 2007/2008; Friend & Bursuck, 2009). By utilizing these six strategies, co-teachers can meet the needs of those students with Individual Education Plan (IEP) goals while also tailoring lessons to meet the needs of the other students in the class (Friend et al., 2010).

### **Benefits of Co-Teaching for Teachers and Students**

In addition to providing students with the Least Restrictive Environment, other potential benefits have been shown to exist in co-teaching for both teachers and students. Students and teachers have reported positive perspectives on co-teaching and feel the practice contributes positively to student behaviors (Campbell & Jeter-Iles, 2017; Hang & Rabren, 2009). Students with disabilities stated that their self-confidence increased, and they learned more in the co-taught classroom (Hang & Rabren, 2009; Keeley et al., 2017). Moreover, research has shown that the co-taught classroom offers an environment where students with special needs reported they felt connected (Friend, et al., 2010), accepted (Kohler-Evans, 2006), and they felt safe in an environment supported by two teachers (Gately & Gately, 2001). Fenty and McDuffie-Landrum (2011) found that teachers in co-taught classrooms develop a sense of comfort and confidence because they build upon both of their levels of expertise.

There are numerous benefits of co-teaching for the teachers and students (Brendle et al., 2017; Hurd & Weilbacher, 2017). Teachers like being able to individualize lessons more for students when co-teaching, and in turn, they are better able to meet their students' needs. Co-teaching offers more opportunities for small group work and re-teaching when two teachers are available. Students have a choice as to which teacher to go to for help, permitting students to connect to the teaching style of one teacher more than another. Hurd and Weilbacher (2017) have offered that an unanticipated benefit of co-teaching they found in their research was that the students who were initially shy at first came out of their shell and become more engaged in the classroom.

### **Obstacles to Successful Co-Teaching for Teachers**

One of the biggest obstacles to successful co-teaching is the lack of teacher preparation for the practice (Brendle, et al., 2017; Brinkmann & Twiford, 2012; Chitiyo, 2017). Teachers often indicate that they feel they lack the skills necessary for successful co-teaching and many were not given any training in co-teaching practices (Chitiyo, 2017). They believe that initial, and on-going, training is necessary. Finding ways to best train co-teachers, however, can be a hurdle.



One study found a potential solution to this issue. Ploessl and Rock (2014) utilized an online bug-in-ear technology to deliver eCoaching to co-teachers as they planned and taught co-teaching lessons. The eCoaching provided immediate feedback that included questioning, encouragement, instruction and corrections. Results indicated that all participants successfully planned and implemented more lessons using a variety of co-teaching models. Additionally, student-specific accommodations increased in planning and usage throughout the study, indicating eCoaching provided effective training for teachers (Friend & Cook, 2010; Ploessl & Rock, 2014).

Co-planning is a key task in creating successful co-teaching teams which means that teachers need time to plan together. This can be an obstacle if co-teaching teams do not share a common planning time (Scruggs & Mastropieri, 2017). For co-teachers that lack a common planning time, web-based documents (such as Google docs) can be used so that both teachers can add notes to the plans, and read their partners' notes, as well as access them at any time (Scruggs & Mastropieri, 2017). However, even when teachers do share a common planning time, Brendle et al. (2017) found the time is not effectively utilized because they lack the training in how to co-plan. Therefore, not only do co-teachers need a common planning time, but they also need training in how to effectively use that planning time.

Another roadblock to successful co-teaching can be the classroom composition. Isherwood et al. (2013) conducted a qualitative study on one school district in Pennsylvania that included fifteen co-teaching teams that had implemented co-teaching. The results from content analysis found that the secondary teachers were not only dissatisfied with the lack of poor co-planning time, but the classroom composition further created dissatisfaction. The high school co-teaching teams found it difficult to effectively teach as students with disabilities comprised 40%-85% of the class in each team. At the elementary level, Isherwood et al. (2013) found similar dissatisfaction due to classroom composition. At the elementary level, only one classroom per elementary school was designated as the inclusion class. All students with an IEP were placed in that class and were supported by a co-teacher. Throughout the year, however, students in other classes qualified for special education services and they would have to be uprooted from their homeroom and moved into the inclusion class to receive services (Isherwood et al., 2013). As a

result, the number of students to be served made it difficult for the co-teachers to meet the needs of all students.

One final obstacle is that co-teaching must be well-supported by the administration (Campbell & Jeter-Iles, 2017). The master schedule needs to be created to include common planning time for co-teaching teams. Administrators should also take into account the number of general education teachers the special education teacher is assigned to and keep the number to a minimum. This will allow time for co-planning and the building of a working relationship between co-teaching partners (Campbell & Jeter-Iles, 2017).

### **Teachers' Perceptions and Preparedness for Co-Teaching**

Preparing teachers for instructing students with disabilities has become an area of focus for current teacher preparation programs (Gottfried, et al., 2019). In the past, studies have found that large percentages of teachers did not learn about co-teaching through university coursework (Brinkman & Twiford, 2012; Chitiyo, 2017). In more recent years, however, special education teacher preparation programs have begun to focus on aspects of co-teaching (Friend et al., 2010). Now, with new teacher licensure requirements, such as edTPA that are used in many states, general education teacher programs are also beginning to focus on best practices for meeting the needs of students with disabilities, including co-teaching practices (Gottfried et al., 2019). Because initial preparation for co-teaching in teacher certification programs is still in the early stages and a large number of current teachers did not have university coursework for preparation, it is imperative that teachers are provided with high quality professional development programs regarding co-teaching (Friend et al., 2010).

Despite there often being a lack of teacher training for the role of co-teacher, teacher perceptions of co-teaching are often positive (Campbell & Jeter-Isles, 2017; Hang & Rabren, 2009). Teachers report that they have positive relationships with their co-teaching partners and feel the experience is valuable (Campbell & Jeter-Isles, 2017; King-Sears et al., 2014).

### **Summary**

In order to meet the federal mandates of IDEA (2004), co-teaching is a widely used instructional strategy for students with disabilities. Although research has reported benefits to co-teaching, obstacles have also been identified. One clear challenge to effective co-teaching is a lack of

teacher training. Many schools all over the United States are implementing this model; yet, it is not clear if teachers are trained in the practice before becoming a part of a co-teaching team. The literature has reported that teachers need time to plan together and if individuals' schedules do not allow for common planning time, then co-teaching teams may not be effective. Finally, a review of the literature has shown it is important to identify within co-teaching teams what is working well and what needs to be improved in an attempt to improve the co-teaching experience for both teachers and students.

### ***Methods***

This study employed a sequential mixed methods design using a qualitatively oriented survey followed by semi-structured interviews (quan→QUAL) (Creswell & Plano Clark, 2017). Mixed methods approaches are best suited for studying complex phenomena where each unique data source contributes greater nuance to the project as a whole (Greene, 2015; Poth, 2018; Shannon-Baker & Edwards, 2018). The purpose for mixing methods permitted data triangulation (Bryman, 2006; Creswell & Plano Clark, 2017; Johnson et al. 2007; Plano Clark & Ivankova, 2016). A qualitatively-oriented survey provided a diversity of responses on the topic of co-teaching (Jansen, 2010). Participants for the interviews were then recruited from the survey responses. Individual interviews provided space for teachers to freely discuss their feelings toward their level of preparation for, and confidence in, employing co-teaching strategies (Creswell, 2002). This study was approved through ethics board reviews by the university and the local school district.

### **School Context and Participants**

This study took place at Endeavour Elementary School (pseudonym) located in a suburban county in north Georgia. This school has an enrollment of approximately 750 students. 15% of the student population at the school is students with disabilities as compared to 12% of other schools in the county as a whole. The percentage of students with disabilities at the school has increased from 7.9% since 2010. Inclusion is prevalent throughout the school.

The focus of this study was on elementary school teachers in order to gather information from participants with similar schedules and co-teaching partner situations. A typical case sampling strategy was utilized to survey and conduct interviews with participants who were currently co-

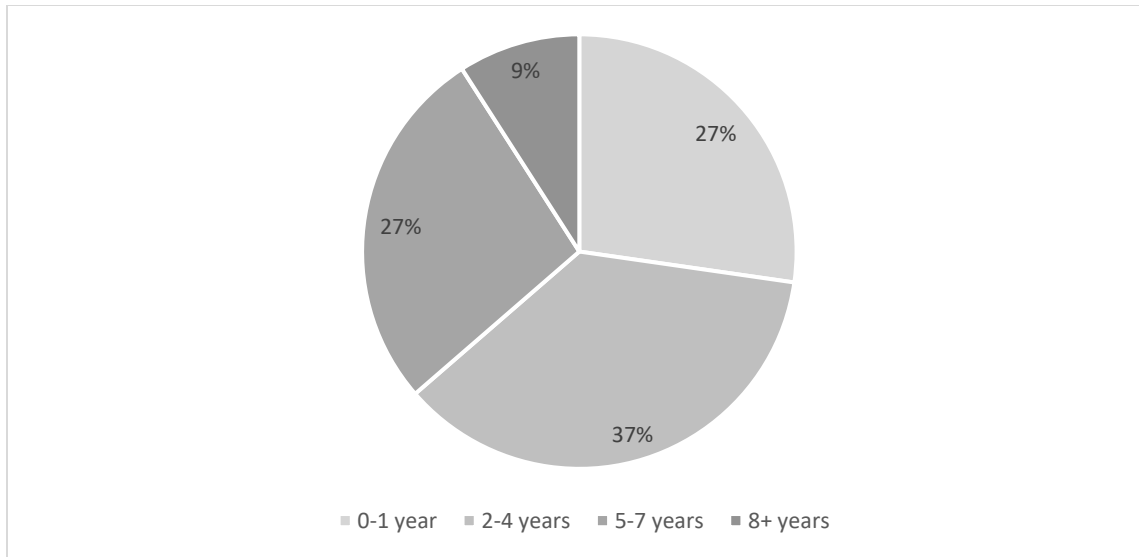
teaching at the same elementary school. This provided the researchers with participants who had similar experiences in terms of training opportunities available to them and further allowed the researchers to gain an in-depth understanding of their experiences (Patton, 2002).

The population included seven general education teachers and four inter-related, special education teachers who worked on co-teaching teams in kindergarten through fifth grades. The survey was sent via email to all co-teachers in the school and a 100% response rate ( $n = 11$ ) was obtained. Three of the participants had co-taught zero to one year; four had co-taught two to four years; three had co-taught five to seven years; and one had co-taught more than eight years (see Figure 1). The follow-up interviews were optional for all co-teachers and five teachers participated in the interview process; three were general education teachers and two were special education teachers. In order to ensure confidentiality, all district, school, and participants' names were changed to pseudonyms.

## **Instruments**

### ***Survey***

The survey (see Appendix A) was developed by the researchers based on questions from Howerter's (2013) Co-Teaching Questionnaire. In the development of the questionnaire, Howerter (2013) identified, through a review of literature, six common pillars in co-teaching: "co-teaching models, co-communication, co-planning and co-preparation, co-instruction, co-conflict resolution, and co-teaching strategies" (p. 107). These pillars guided her development of the 45- item questionnaire. The reliability of the questionnaire was checked by the team to ensure the paper was formatted correctly into Qualtrics and reliability was set at 100%. It was also pilot tested to ensure the online format worked properly.



*Figure 1: Distribution by the Number of Years for Co-teaching*

For this study, the questions from Howerter’s (2013) questionnaire were modified from a pre-structured answer format to an open-ended format. This enabled participants to give deeper insights into their perspectives regarding the subject of co-teaching and their training for implementation. The number of questions was pared down in order to focus on certain aspects, such as training, that addressed this study’s research questions. Questions were also developed based on the literature review conducted by the researcher. The revised questionnaire was submitted for expert feedback from a research methodologist. The survey was provided to participants in an online format using SurveyMonkey. It was available to participants for 10 days.

### ***Interviews***

Semi-structured interviews were conducted with participants after the survey data were collected. Interview questions (see Appendix B) were designed to gather deeper information about the benefits and challenges individual teachers perceive in their co-teaching experiences (Rubin & Rubin, 2012). The interview also provided participants the opportunity to elaborate further on their survey responses (Creswell & Plano Clark, 2017), such as on their training related to co-teaching and how adequate they felt that training was. Interview questions were developed by the researchers based on the literature review conducted and the benefits and challenges to co-teaching identified in the literature. Each interview lasted for approximately 45 minutes and were

audio-recorded. The first author also kept field notes using a field journal. In the field journal, she noted markers to come back to at a later point in the interview. For this study, the definition of *markers* is a word or phrase mentioned by the interviewee about a separate topic from the given interview question (Leavy, 2017). These markers lead us to ask further questions which provided deeper insight and important information for the study.

### **Data Analysis**

Survey questions 1a, 1b and 1c (demographic questions on grade level, years teaching, and months/years co-teaching) and Questions 2a and 2b (type of training on co-teaching the participants had received) were analyzed descriptively: ranges reported, mean years taught and co-taught, and amount of each type of training. The open-ended survey questions were then uploaded to the research software MAXQDA. All audio-recordings of interviews were transcribed and uploaded to MAXQDA.

Data from both the survey and interviews were integrated during the analyses. The open-ended data from the survey and interviews were first coded with attribute coding for data management, followed by descriptive coding to identify commonalities between both data sources (Saldaña, 2016). Next, in vivo coding was used to maintain the exact language used by the participants in both the surveys and interviews (Leavy, 2017; Saldaña, 2016). Emotion coding was done during the initial coding phase to identify teachers' underlying feelings towards co-teaching (Saldaña, 2016). In conjunction, the initial stage of analysis also included memo writing by the first author. "Memo writing involves thinking and systematically writing about data you have coded and categorized" (Leavy, 2017, p. 152). Memos were used to organize ideas and document coding procedures (Strauss & Corbin, 1990). All memos were written and kept within the MAXQDA program.

When initial coding was complete, a second cycle of coding focused on developing major themes based on how the codes from the data as a whole could be grouped together in order to best address the research questions (Saldaña, 2016). The themes were used to create meaning from the data and were compared to those found within the existing literature (Leavy, 2017). A copy of the completed research paper was given to Queen County Schools (pseudonym) and the building principal at Endeavour Elementary School to share the needs of co-teachers in the building.

## Results

The purpose of this research study was to investigate how general education and special education teachers in one elementary school in Georgia are trained in the instructional practice of co-teaching and their perceptions on how prepared they feel to implement the method. The results section presents the integrated findings from both data sets.

### RQ1

Research question one asked: What training do teachers receive on co-teaching? In response to this question, 63.64%, or seven out of eleven, participants in the survey indicated that they had received training on co-teaching, while 36.36%, or four out of eleven, responded that they had not received any type of training on co-teaching. Of the seven participants who had received co-teaching training, the topics and breakdowns for those trainings were as follows: Models of co-teaching (85.71%), How to build a successful relationship with your co-teacher (100%), How to develop classroom rules and expectations with your co-teacher (57.14%), and Co-planning (planning lessons together as a team for your students) (71.43%) (See Figure 2).

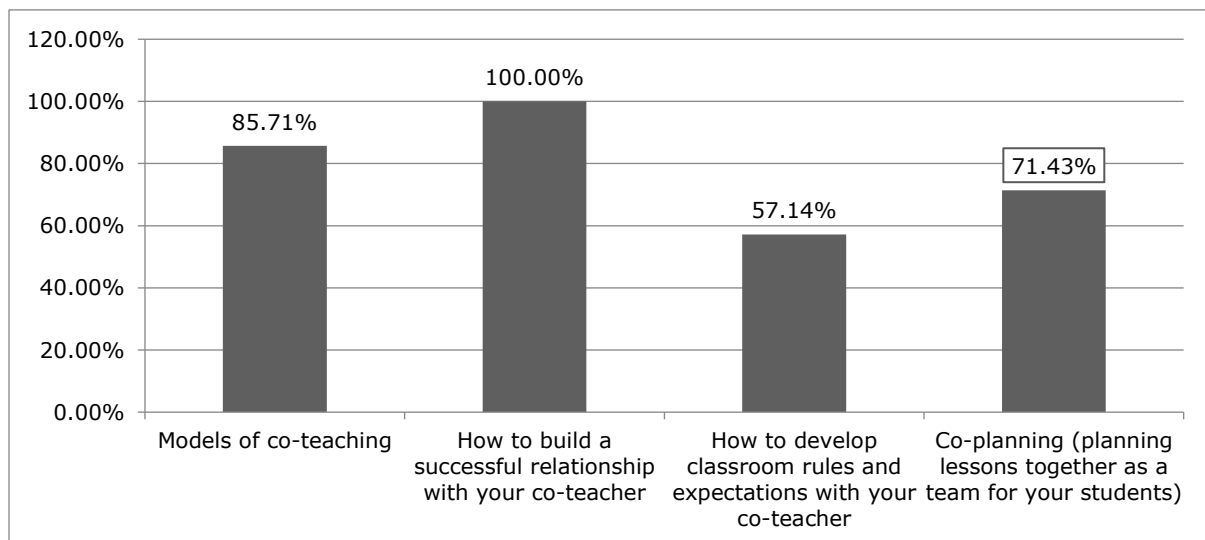


Figure 2: Percent of Participants Who Received Training Relevant to Co-teaching

## **RQ2**

Research question two asked: How prepared do teachers feel in the use of co-teaching as an instructional model? Survey data indicated 63.64% of participants felt adequately trained to serve in a co-teaching role while 36.36% of participants did not feel they had been adequately trained. However, the findings did indicate that while some of the participants felt adequately and some did not, all participants (100%) had received co-teaching training via professional development provided by their school district and two of the teachers had also received co-teaching training in their undergraduate and graduate studies.

## **RQ3**

Research question three asked: What do teachers see as the benefits and challenges of co-teaching? After careful analysis of the coding, the survey and interview data indicate there are several benefits of co-teaching for both students and teachers. The following themes emerged regarding the benefits of co-teaching: 1) supportive and safe environment, 2) instructional support for students and teachers, and 3) confidence builder due to collaboration. Based on the survey and interview data, participants' responses predominantly focused on the challenges for teachers in a co-teaching model. The following themes emerged regarding the challenges of co-teaching: 1) insufficient time for collaboration, 2) inconsistent teaching schedule, and 3) student behavior problems.

### ***Benefits***

**Supportive and Safe Environment.** Consistently named as a benefit of the co-teaching model was that two teachers in the room means more support for all students, both students with disabilities and without disabilities. Participants' responses noted that when students with disabilities are included in the large group and have access to the general education curriculum, they benefit from a safe environment provided by the support of two teachers. One survey respondent wrote, "The students are able to feel safe with a great learning environment to support all of the children's needs. This allows not just special education students to receive extra assistance, but all students in the classroom."



Another participant noted that by having two teachers in a classroom, students with special needs feel secure and have a sense of belonging because they have the support of two teachers. This finding was echoed by another participant who recorded, “Co-teaching enables students with special needs to feel accepted because they have the support of two teachers.”

The participants also expressed that a benefit of a co-taught classroom was the extra support they received by working with an additional teacher. One participant wrote, “I have to admit I feel relieved by having the support of another teacher in the room to bounce ideas off regarding lessons or to just give me a break when I feel overwhelmed by a student’s immediate needs.”

**Instructional Support for Students and Teachers.** From data analysis, participants’ responses provided further evidence to show that co-teaching is a benefit to students with disabilities due to the additional support they receive on instruction from two teachers in the classroom. The findings showed that co-teachers play on each other’s strengths by having one teach a subject the other may not feel as comfortable teaching. Participants’ responses indicated that students with disabilities hear different approaches to teaching the same topic which can help fill in gaps in their understanding. Chelsea, a co-teacher said, “I may do something one way, somebody may do something another way and if the kids just constantly hear it my way, and they're not getting the other way, then I don't think they benefit as much.”

Another teacher noted in her survey response, “The students’ greatest benefit of having two teachers is how they may deliver content differently. This helps reach all types of learners.” This statement highlights the benefit of co-teaching due to the diversity of students in every classroom. Having co-teachers teaching about the same topic can help meet the wide range of needs that exist in a classroom.

Participants in the study also noted that it is easier to run small instructional groups when there are two teachers in the room. Brynn, a co-teacher stated, “My center times are more controlled and focused because there's two adults, two sets of eyes, lots more opportunities for conferencing.” This statement reinforces the premise that each teacher can run a different group,

or one teacher can float between groups to give students assistance while the other teaches the lesson to a small group of students during co-teaching. Participants' responses noted that co-teaching was especially helpful in classrooms with a larger number of students or in primary classrooms (kindergarten-second grade) where the students are less independent.

**Confidence Builder due to Collaboration.** For the special education teacher who works with multiple grade-levels, it can be a daunting task to know all the standards that exist in a particular grade level. This is where the collaboration between the general education teacher and special education teacher can provide support and tips on how to teach a specific skill. Findings from data analysis showed that the co-teacher relationship can boost a special educator's confidence in teaching a subject or skill they do not feel strong in teaching, as well as boost the confidence level for regular education teachers who are unsure on how to reach all students' needs. Responses indicated the collaborative nature of co-teaching allowed them the opportunity to bounce ideas off each other and feel more confident on how best to approach a new lesson. One survey respondent wrote,

*It is great to have someone who can offer me advice on how to best support the students in my class who have learning differences. It is also great to have someone else who can notice other students who might need help. We also are able to share resources and ideas for lessons and feel more confident in what we were teaching.*

Another general education teacher noted that her special education co-teacher is able to break things down into smaller pieces for the kids to be able to understand. [She felt that this was not a strength for her as a teacher, and therefore, she appreciated that her co-teacher was able to assist with this.]

### **Challenges**

**Insufficient Time for Planning.** Regarding the challenges co-teachers face, insufficient time for planning and collaboration together was a theme that emerged from data analysis of the survey and interviews. Participants' responses indicated that the lack of time leads to unequal sharing of responsibilities and lesson planning. These expressions highlighted how one teacher, usually the

general education teacher, will plan the lessons to be taught and the special education teacher will make a separate plan for the students with disabilities based on that lesson or modify the assignments in real time in the classroom. In the survey, one teacher wrote,

*One of the challenges of my co-teaching position is that we never have time to plan together. We do not have time to collaborate on lessons or to discuss next steps for students. It would be very helpful if teachers who were participating in co-teaching had a dedicated time on a regular basis, even if it was just a couple of times a month, to collaborate.*

Participants in the study noted that if they had more planning time together, they could further discuss students' needs and better plan the next instructional steps to take. Participants also noted that more time to plan would permit them to differentiate lessons to a greater degree and as one participant stated in the interview, "We need more time to collaborate and to talk about the lessons to a greater extent."

**Inconsistent Teaching Schedule.** From data analysis, one theme that emerged was the inconsistent teaching schedule. One participant shared that her schedule had been changed at least four times during the academic year because a student in a different grade level needed more support. As a result, the special education co-teacher's schedule had to change which in turn, meant that the special education co-teacher then had to come to her class at a different time of day for their co-teaching segments. This schedule change required the regular education teacher to shift her teaching times of various subjects to be in compliance with the student's IEP support segments.

**Student Behavior Problems.** Participants expressed frustration with the difficult behaviors they have had to deal with because of students in the co-taught setting. Several participants shared that "some days are easier than others," and one participant shared in the interview that some teachers are reluctant to participate in co-teaching because they know they will get the "low kids." Other participants noted that learning time is often lost due to behavior issues which impact the other students in the class. Candace stated,

*Our children with emotional needs need to be pulled out or we have to evacuate the other students in the classroom which hinders everyone's learning at that point....We have all faced this this year in the class and it not only affects us and my class, but it affects my teammates too because they have to bring 30 more kids into their class and then it's one teacher with 60 kids. And there's not any learning that can take place at that point.*

### ***Discussion of Findings***

The major themes found in this study reflect the current literature on co-teaching. This study found that over half of all co-teachers at the elementary school had received some type of training on co-teaching. All co-teachers shared that their school district had provided them optional training during the academic year and most of them felt well-prepared to serve in the co-teaching role. Overall, participants' comments reflected Hang and Rabren's (2009) study which reported positive teacher perspectives on co-teaching. These comments included quotes such as "It's been a really great experience for me" and "I love it. It works beautifully for us." Campbell and Jeter-Iles (2017) stated that educators in their study viewed the co-teaching model as valuable but believed certain practices such as common planning time were needed. Participants in this study mentioned that the positives of co-teaching outweigh the negatives and although they would like more time for collaboration, many expressed that they desire to continue working in a co-teaching role. When examining these findings through the lens of Bandura's (1977) self-efficacy theory, the teachers in this study felt well-prepared to serve in the co-teaching role and therefore persevered through the challenges encountered to find the positives of co-teaching. This high perceived self-efficacy potentially pushes them forward to continue serving as a co-teacher and strive to better themselves each year.

A supportive and safe environment, instructional support for both students and teachers, and confidence builder were found to be themes in this study. The participants expressed they felt students with disabilities learned more in a co-taught classroom because they had the opportunity for additional support. The participants also felt relieved by having another teacher in the room

to bounce ideas off regarding lessons or just give them a break when they felt overwhelmed by a student's immediate needs. Subsequently, the findings of the current study align to studies conducted by Brendle et al. (2017), as well as Hurd and Weilbacher (2017). Both studies found the theme of extra support for both teachers and students were prevalent in co-teaching classrooms. The participants also stated that students with special needs felt safe in a co-taught classroom with the assistance of two teachers and they developed a sense of belonging which aligns to the findings of Gately and Gately (2001) who found that students with special needs felt safe in an environment supported by two teachers.

The participants also expressed they felt students with disabilities learned more by being in a co-taught classroom because of the opportunity for additional one-on-one help and the opportunity to receive instruction from different approaches with two adults available. The findings showed that co-teachers play on each other's strengths by having one teach a subject the other may not feel as comfortable teaching (Hurd & Weilbacher, 2017). The participants also felt it was a confidence builder to have another teacher in the room to collaborate on teaching ideas. This finding is supported by Fenty and McDuffie-Landrum (2011) who found that teachers in co-taught classrooms develop a sense of comfort and confidence because they build upon both of their levels of expertise.

In this study, a lack of time for collaboration was found to be a challenge for co-teachers which parallels Scruggs and Mastropieri (2017) report that not having a common planning time for co-teachers can be a roadblock to success. In order for a co-teaching relationship to flourish, co-teachers need time together to plan and talk through lessons as well as identify how best to address students' needs. Brendle, et al. (2017) noted that co-teachers in their study discussed how to present a lesson right before class began. Two co-teachers in this current study indicated they often modify lessons to accommodate students' varying needs "on the fly" during class time because they do not have time to plan together. Other teachers expressed that the general education teacher typically does the planning and the special education teacher modifies for her students as needed, but they do not co-plan together due to a lack of time which was also reported by Brendle et al. (2017).

From data analysis, one theme that emerged was the inconsistent co-teaching schedule. One participant noted that her schedule had changed multiple times to accommodate the special education teacher's schedule which was frequently changed to meet the needs of other special needs students in different grade levels. Campbell and Jeter-Iles (2017) have stressed that co-teaching must be well-supported by the administration and master schedules must permit common planning time for co-teaching teams. Inconsistent co-teaching schedules, not only leads to poor co-planning, but also limits the working relationship between co-teaching partners.

The theme of student behavior problems emerged as a challenge to co-teaching in this study which is similar to Isherwood et al. (2013) who found that class composition can pose difficulties to co-teaching classrooms. One of the participants in this study discussed in her interview that some teachers do not want to take on a co-teaching role because they are afraid they will get the "low kids" or the ones with difficult behaviors. She also expressed that often students who do not have an IEP, but are academically low, are placed in a co-taught classroom because there are two teachers. This can lead to a high number of students in a class who are academically low performing. Considering teachers are faced with high stakes testing, this can create an extra roadblock to getting teachers to want to serve in a co-taught role.

### **Limitations of the Study**

Because this study took place in only one elementary school, the study is limited in its findings. Although the results have the potential to benefit the co-teachers at the school where the study was conducted, the results cannot be generalized across other schools because they potentially have different co-teaching schedules and dynamics of co-teaching teams. Given more time to complete the study, the researchers could widen the participant group to include general education and special education teachers throughout the county in order to illuminate the perceptions of co-teachers across the district. This would allow the researchers to analyze if the identified themes persist across the county. Moreover, the participants had the option of participating in the follow-up interview. Therefore, it is possible that only those teachers with a positive view of co-teaching volunteered to be interviewed.

### **Implications for Practice**

The results of the study provide an opportunity for principals to reflect on how to better support the teachers in the building who serve in a co-teaching capacity. This might include making common planning times a priority for co-teachers or adding some incentives such as extra planning time for those teachers that serve in a co-teaching role. The findings of this study further imply that the distribution of students with disabilities could be equally distributed across classes in a grade level, rather than having only one co-taught classroom per grade. Moreover, the results of this study imply that co-teachers lack skills on behavior management and administrators need to provide co-management training to address student behavior issues.

This study also provides school systems beneficial feedback regarding co-teaching training that has recently been incorporated into professional development days. Teachers in the study felt positively about the trainings they had attended. This will potentially encourage schools to continue and expand the trainings available to teachers on this subject. Finally, the findings of the current study suggest that teacher education programs should consider the merits of co-teaching for certification-seeking students. Integrating co-teaching into field experiences would be advantageous for preservice teachers as part of their training in order to be better prepared for their own inclusive classrooms.

### **Recommendations for Future Research**

In future qualitative studies regarding co-teaching, the researcher should consider making participation dependent upon both completion of the survey as well as a follow-up interview. This would ensure a deeper understanding of all participants' views as it was found in this study that the interviews yielded more in-depth answers to questions than the survey. More emotions could also be analyzed based on the answers given verbally by the subjects in the interviews.

Future studies could also be expanded to include elementary level co-teachers from across the entire county. This would allow comparison between schools to see if the major themes found in this study hold true across the district. It would also provide further insight into if the district level co-teaching training has been attended, and found beneficial, by teachers throughout the county.

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## Book Review: SWITCH: How to Change Things When Change is Hard

Reviewed by Olive McLaughlin

### Abstract

Change is a necessity for growth and without it, individuals remain stagnant; both professionally and personally. In the realm of education, whether as a teacher or administrator, you must be able to lead and be adaptable. It is important that one be able to encourage change in others in order for growth to be seen within an organization. The book, *Switch* assists in understanding the facets of change while providing the necessary tools to develop an ease and willingness in others to want to change. This change is the foundation block for the growth of an organization and the betterment of both the individual and the organization. The authors, Dan and Chip Heath delve into a three-fold path of garnering gradual change in an individual and its benefits.

Comparatively, *Switch* identifies many of the themes discussed within the coursework of this class and discusses the theme of change; which mirrors the theme in *Leading in a Culture of Change* by Michael Fullan. Although the authors of both pieces focus on the change, they have different approaches to arriving at that destination. The review of *Switch* examines how it constructively addresses the theme of change and its implications to consider the antithesis or failure to produce effective change.

*Switch: How to Change Things When Change Is Hard* by Chip Heath and Dan Heath investigates why there is a common difficulty for individuals to change (switch) their behavior. The Heaths (2010), use the understanding of the mind and anecdotes of real-life circumstances to explicate how it is plausible to find shortcuts that make change unchallenging. *Switch* presents simple still effective provisions for implementing change. Although, this book can be used as a guide for making the change in multiple areas in life; it is specifically adaptable in the educational arena. As both a teacher and an administrator this book provides a structure of how to develop change in the classroom, and departments, or change the culture of a staff. Overall, *Switch* summarizes how an individual can lead and encourage changes in human behavior both

in the individual and the organization, by focusing on three main aspects that impact change: the rider, the elephant, and the path.

The main themes discussed in the book focus on the, “Three Surprises about Change, Directing the Ride, Motivating the Elephant, and Shaping the Path” (Heath, 2010, p.1-250). These themes explain the different stages of change and motivate it in others. *Three Surprises About Change*, focuses on the issues that derive from the behavior that prevents change; people, in general, refuse to believe the results and are in denial about the issues at hand; this denial usually leads to the reality that “what looks like a people problem is often a situation problem” (Heath, p. 3). This chapter distinguishes between hard changes and easy changes. The main arguments surround the ideal that “successful change shares a common pattern. They require the leader of the change to do three things at once” (Heath & Heath, 2010, p.4). These things include: to change the behavior of an individual, you must change the individual’s circumstances. Secondly, what seems like laziness is usually exhaustion, and lastly what seems like resistance to change is really a lack of clarity.

These three surprises about change can’t be addressed unless the two sides of the brain are examined: the emotional and rational brain. Each part is described by the author as a distinct part that must be appealed to in a balanced manner in order for people to choose to change. The Elephant is the emotional side that is instinctive and feels pain and pleasure. The Rider is the rational side of the brain; it is conscious, analyzes, makes decisions, and looks into the future; it guides the Elephant. Change occurs when the rider can balance the elephant long enough to keep it on the path; long enough to reach the final destination. When the rider and the elephant disagree about which direction to go that is where the problem of change becomes difficult.

According to Heath & Heath (2010), When people try to change things, they’re usually tinkering with behaviors that have become automatic, and changing those behaviors requires careful supervision by the Rider. The bigger the change you’re suggesting, the more it will sap people’s self-control. And when people exhaust their self-control, what they’re exhausting are the mental muscles needed to think creatively, focus, inhibit their impulses, and persist in the face of frustration or failure. In other words, they’re exhausting precisely the mental muscles needed to make a big change. (p. 19)

The authors outline a basic three-part guide to foster change. First, “direct the rider” by providing clear direction. Many times people confuse laziness with opposition. When directions are crystal clear people are more likely to understand what needs to be done and follow through. Secondly, “motivate the elephant,” what seems like apathy can be consistent with burnout. The rider cannot maintain power through force for too long. It’s important to capture individuals’ emotional brain, the elephant, to keep people on the path to change, and basic cooperation. Lastly, “Shape the path. What looks like a people problem is often a situation problem” (Heath & Heath, 2010, p.3). Shaping the path refers to carrying out a vision as a leader; when the path is created you are more likely to produce change regardless of what's happening emotionally, with the elephant, or rationally, with the rider. The authors suggest that if you can accomplish these three things all together at once you can achieve dramatic change even if you don’t have the necessary assets or support. The overarching theme is that change becomes easier due to using a structure that includes all the components involved in an individual’s decision-making process, making change not easy, but easier.

Heath (2010), develops this outline by determining what works in an organization or for an individual. In directing the rider you must know what works and what direction to go on the path. A leader must identify the bright spots. The bright spots are actions, efforts, behaviors, or structures that are worth emulating. “In tough times, the Rider sees problems everywhere, and “analysis paralysis” often kicks in. The Rider will spin his wheels indefinitely unless he’s given clear direction. That’s why to make progress on a change, you need ways to direct the Rider. Show him where to go, how to act, what destination to pursue.” (p.33)

Overall, it is the bright spots that help to determine what is working and how it can be continued. “Big problems are rarely solved with commensurately big solutions. Instead, they are most often solved by a sequence of small solutions, sometimes over weeks, sometimes over decades.” (Heath & Heath, 2010, p.42) The issue with change is that the Rider is problem-focused instead of solution-focused. The bright spots give us areas of success to maintain, develop and use as a means to encourage positive results. It is a solution-based directive that helps to initiate change.

The Heaths (2010), develop the facet that change leads to uncertainty and this causes direct resistance toward it. The major issue is that the Rider is the rational part of our brain and the more options there are, the more difficult it is to make decisions. To ensure a smoother transition

to change, “Script the Critical Moves” (p.53). Change ambiguous goals into specific behaviors by creating clear and concrete guidance.

When you want someone to behave in a new way, explain the “new way” clearly. Don’t assume the new moves are obvious. If you are leading a change effort, you need to remove the ambiguity from your vision of change. Until you can ladder your way down from a change idea to a specific behavior, you’re not ready to lead a switch. To create movement, you’ve got to be specific and concrete. (Heath & Heath, 2010, p.62-63)

The Rider often has issues over analyzing and thus it is hard to always get to the destination-change desired. In order to override this weakness, the authors suggest that you must have an organized direction that appeals not only to the rational side but the emotional side, SMART goals will not be enough. People have to feel tired emotionally of what they’re doing for change to occur. Point to the destination by marrying the long-term goals with short-term critical moves.

Heath (2010), explicates this by stating:

The Rider’s strengths are substantial, and his flaws can be mitigated. When you appeal to the Rider inside yourself or inside others you are trying to influence, your game plan should be simple. First, follow the bright spots. As you analyze your situation, you’re sure to find some things that are working better than others. Don’t obsess about the failures. Instead, investigate and clone the successes. Next, give direction to the Rider—both a start and a finish. Send him a destination postcard and script his critical moves. When you do these things, you’ll prepare the Rider to lead a switch. And you’ll arm him for the ongoing struggles with his reluctant and formidable partner, the Elephant.

To shrink the resistance to change the authors suggest that leaders need to determine the feelings that are most effective for the change outcome desired. Individuals need the sequence of “SEE-FEEL-CHANGE” (Heath & Heath, 2010, p.106) to engage others, on an emotional level, in the process of change. Thus, there is a necessity to foster positivity, creativity, and hope in others to solve more significant problems. Using negative emotions to garner change that is specific and immediate may be more successful than positive. Another way to shrink change “is to make people feel as though they’re already closer to the finish line than they might have thought. If you



want a reluctant Elephant to get moving, you need to shrink the change. Another way to shrink change is to think of small wins—milestones within reach. When you engineer early successes, what you're really doing is engineering hope. Hope is precious to a change effort. It's Elephant fuel. Once people are on the path and making progress, it's important to make their advances visible." (Heath & Heath, 2010, p.139-148) When small goals have been set, people see them, and success has been achieved, people begin to believe that they can succeed and that is how change occurs. The key here is to have goals that are meaningful and within reach.

Resistance is a major fact of change; humans, in general, don't like the idea of change. In order to foster an acceptance to change; Heath suggests that the development and growth of the individual are necessary. The growth mindset is one that needs to be developed. In order to develop a growth mindset there must be an understanding that for change to be successful, there must be a failure. Failure helps individuals to learn from their mistakes which ultimately leads to success. It doesn't mean that there will be a failure in obtaining the overall achievement but in the process of reaching the ultimate goal. The authors explain that the growth mindset is a necessity to understand failure and continue to grow despite the negativity that will occur while attempting to make a change.

Lastly, the authors derive a clear plan of action for ensuring change by focusing on the environment which focuses on the theme of shaping the path. Heath & Heath (2010), suggest tweaking the environment (Chapter 8). Understanding the behaviors people employ is more about their environment than who they are as individuals. Altering the environment ensures that behaviors that are required become easier and those that are deemed inappropriate much harder. Changing the path means changing behavior. This can occur by designing the direction, goals, and parameters people will take to make changes. It means there is a necessity for a growth mindset, a buy-in to change, and clearly visible direction which will determine the possibilities for behavior; and help the rider to direct the elephant; and the elephant to follow the path.

The building of habits is one that ensures that change actually takes place. It is in the habits that the action of change occurs. The authors suggest that checklists ensure the combination of tweaking the environment and building habits.

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“Checklists have three advantages, including:

1. Educating people about what’s best, showing them the ironclad right way to do something.
2. Helping people avoid blind spots in a complex environment.
3. Insuring against overconfidence.” (Heath & Heath, 2010 p.221)

Change is not just one achievement or hurdle, but a constant process. Heath (2010), explains that “ If you want to change things, you have to pay close attention to social signals because they can either guarantee a change effort or doom it. ( p. ) Little changes can become grand changes and follow a pattern. To maximize and continue with change it is a constant necessity to follow the steps outlined in the book, but to continue on the path and not stop at one achievement, because change is constant. If you want to change things, you have to pay close attention to social signals, because they can either guarantee a change effort or doom it.

***Switch*** provides an outstanding way to tackle change at an entry-level, individual, organizational, or societal level. The authors use research, everyday experiences, organizational case studies, psychological findings, and case-by-case basis to explicate the possibilities of change through each theme described. The most important aspect of the book is how it outlines and details the steps needed to bring about change. Each chapter embodies one particular aspect of the aforementioned themes. The switch is the change, but the change is a continual process. The book provides the reader with a seemingly foolproof response to addressing resistance to change.

A criticism of ***Switch*** lies in addressing the negative impacts of resistance on the individual. Although, the resistance to change is addressed throughout; the authors fail to delve deeper into how resistance to change can cause everlasting failure. The authors skim over this area by placing a band-aid on resistance through the building of habits and developing a growth mindset. There is a necessity to give concrete examples of thwarting resistance to ensure the success of

change.

Comparatively, *Leading in a Culture of Change* by Michael Fullan discusses change from the viewpoint of how to develop a culture of change. Fullan focuses on the implementation of expansive phases, those being: initiation, implementation, continuation, and outcome. Similar to *Switch*, there is a consistency with a necessitated structure that facilitates change. Switch is more generalized in their approach while Fullan outlines phases as specific to culture for change. Both authors foster the belief that there must be a specific pattern created to address change and when achievement is developed; there should be new ways to continue the process. In addition, both works provide for the continuation of change even after outcomes are achieved.

However, Fullan develops his strategies on the basis of leadership as the primary initiator to target change in the stratospheres of business and education. Fullan also saw checklists as less important in developing the culture of change, and the leader as the conductor of change through participation and buy-in of their constituents. *Switch*, on the other hand, focuses on change in individuals, organizations, and society. In this regard, the initiator does not have to be targeted leadership but can come from different avenues. As long as both the rational mind and emotional mind are appealed to and a clear direction is set forth for the constituents to act upon, change can occur. Heath & Heath (2010), see checklists as a major initiative that helps to obtain both goals, motivate, and maintain the continual process of change. Both books have different ways of achieving change but converge primarily on the focus that change is a never-ending process and there must be some set of strategic vision to achieve success.

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## Book Review: Impactful Instructional Leadership – Framework for Success

Reviewed by Priscilla Ramon

### Impactful Instructional Leadership Review

Hunter begins the book with an explanation of how the book is organized and an explanation of what to expect throughout the book. He also explains that the reader will read about *Evidence-Based* practices and goes on to explain what it is. Hunter explained that Evidence-Based practices are vital for educators to be impactful instructional leaders. In the preface, Hunter begins to encourage the reader to think about what they think it means to be an instructional leader. Throughout the book, Hunter often asks the reader to think about their thinking and to see how they can apply what they have read to their life. Hunter not only asked the reader to think about their thinking, but he also asked the reader to find persons that are good examples of leadership and to apply their examples during the reader's instructional leadership practice.

In the introduction of Hunter's book is a summary of the life of Nelson Mandela. During Mandel's imprisonment, he collaborated and used his leadership skills to start a movement to end apartheid in South Africa. After Mandela's release, he worked hard to rise through the ranks of government to end apartheid. Since Mandela had the vision to work towards and was not afraid of hard work, he was able to serve his countrymen and win the Nobel Peace Prize. The author explained that the reason for retelling the story of Mandela's life was to note that even in the most difficult of situations having a *clear vision* and knowing the reason for your vision can guide you through the hardships. Jack Hunter explained that *Instructional Leaders are tasked with improving student achievement, preparing learners for college and career readiness, and ensuring their social-emotional needs are met*. Hunter explained that, like Mandela, for a leader's vision to work, there needs to be a clear vision that will help them reach their goal.

*Impactful Instructional Leadership* shows in a pictorial form how *creation, coaching, triangulation, collaboration, time management, data, etc.*, fit together to complete the instructional *Leadership Puzzle*.

### **Main Themes**

*Impactful Instructional Leadership* uses examples that the reader should be familiar with and ask them to think about how they could apply them during their instructional leadership. He encourages the reader to do a lot of self-reflection throughout the book using questionnaires and open-ended questions. Hunter also asks the reader to think about their organization and to have a clear vision of how and what it can do to aid in making their vision a reality.

Throughout the book, Jack Hunter emphasizes the importance of having a *clear vision* for the organization can aid in *decision making*. Having a *Positive Culture* is essential for ensuring that an organization's vision becomes a reality. A positive culture is the starting point and the driving force for ensuring this reality. A growth mindset is needed for a positive culture to thrive because it is dangerous for an instructional leader to have a fixed mindset. A fixed mindset is not only dangerous to the organization, but most importantly, it is detrimental to the students that encounter teachers with this mindset. Hence, it is crucial that the leadership and their staff revisit and review their vision, which will help them remain focused throughout any trial or hardship they might encounter. Hunter quoted John P. Kotter *Leadership is about setting a direction* (Location No. 327). When leadership has a clear direction, it is empowering to the organization, and it will inspire staff, parents, and students to ensure that the vision is achieved.

Decision-making, growth, time management, reflection, and collaboration are connected as they are needed for instructional leadership to be effective. Hunter defined instructional leadership as "A collaboration partnership between the lead learner and educators that allows for fluid collaboration around student data, equity, diversity and has an impact on curriculum, assessment, student growth and proficiency" (Location No. 339). *Impactful Instructional Leadership* encourages readers to honestly self-reflect on what they have read about what it takes to be an institutional leader and to rate themselves honestly. Honest reflection is needed so that the leader can correctly identify the areas where they are weak so that they can develop those areas because

a leader is developed. Leadership is not a one-person job rather, an effective leader that acknowledges and utilizes the contribution of others.

Shared leadership is linked to decision-making, collaboration, culture, and capacity building. Jack Hunter defined shared leadership within the school setting as "the sharing of decisions that affect teacher work conditions, culture of the school, community engagement, and professional learning for staff while also encompassing the shared distribution of leadership" (Location No. 643). Hunter showed how to develop an *Instructional Leadership* task force focusing on academic issues, and the time it takes to implement. When a leader effectively demonstrates shared leadership, it allows the talents and skills of the staff to be displayed and utilized effectively, thus enabling the organization's vision to come to life. However, leadership should ensure that their staff is equipped with the tools needed to apply their skills effectively.

Leadership should be a *Data Warrior* and ought to avoid falling prey to a new product or educational program that "claims to solve a problem." Therefore, it is important for leadership to *disseminate data, delegate more, spends more time in the classroom, and refer to triangulation of data chart when making decisions* (Location No. 1125). Leadership needs to collaborate with their staff because it allows for the vetting of ideas. Classroom walkthroughs ensure that product or educational program is working with the classroom, the areas that need improvement, or if it is being effectively implemented. Evidence-based and triangulation data are needed to ensure that the practices used are effective. It is important for leadership to effectively use data to see if there is a need for new implementation and its effectiveness. Despite implementing evidence-based practices within the organization, it is useless if the teacher is not trained correctly, so *coaching* is needed.

"Coaching is unlocking people's potential to maximize their own performance" (Location No. 1146). Leadership should foster an environment that encourages training or *coaching* for their staff. Leadership should encourage their staff to implement new strategies even if mistakes are made at the start because "making mistakes is how we truly develop best practices for our school." (Location No. 1400). When school staff implement evidence-based practices and share their success and failure with other staff, it can help to motive other members of the organization to attempt implementation, which will encourage improvement student achievement.

Jack Hunter connected evidence-based practices to professional learning communities, instructional strategies, and collaboration as the last parts of the *Impactful Instructional Leadership* puzzle. It is important for educators to commit to a clear vision set and to keep building their knowledge. For this to be possible, leadership needs to ensure that they nurture an environment in their organization that fosters a positive culture, encourages coaching, promotes collaboration, and effectively uses data and evidence-based practice. Finally, leaders should encourage their staff and student not to be afraid of failure because it is a way to grow and develop.

### **Key Quotes**

"You must know where your organization is going (Vision), know why they are going in that direction (Shared Leadership/Using Evidence-Based Practices), and help all others to get there (Coaching/Reflection)." (Location No. 91) – It is important for the leadership to have a clear goal for their organization because it is a guide to help them be held accountable for their actions. When a vision is set, it allows the organization to implement the needed strategies to achieve its goal.

"... Instructional Leaders much understand that the goal is not to change people; it is to move thinking towards emulation the vision or "Why" of the organization." (Location No. 188) – Leaders should avoid forcing their staff to be like them. Instead, they should share their vision with them so they can see the organization's goal. When the organization's staff are given a clear goal that they are able to be a part of, they are more likely to work toward the goal.\

"impact on conversation is as follows: Words 7%, Vocal Tone 38%, Body Language 55%." (Location No. 475) – Leaders need to remember that it is not what they say but how they say it and what they do while saying it that is essential to their communicated to with their staff. Leadership needs to foster a positive culture that encourages communication and collaboration within their organization. It is essential that leaders learn to communicate effectively because it is vital for their vision to become a reality effectively.

"The staff needs to be a part of creating the objectives for their improvement." (Location No. 1325) – Leadership should listen to their staff's needs and concerns because they are unable to

know what their staff might need and want without asking them directly. Asking their staff the areas in which they need coaching or training is vital for their professional development or to implement their evidence-based practices effectively.

"There is no such thing as a bad teacher, there are just more effective one." (Location No. 2003)– Leadership should keep this mindset as they coach educators; it will help to keep a positive view of their educators. Therefore, it is essential for leadership to encourage their staff to be committed to their own learning.

### **Strengths and Weaknesses**

One of the strengths of Jack Hunter's book *Impactful Instructional Leadership* is how the information is presented to the reader. The information is presented as simple and direct, allowing the reader to focus on the information instead of trying to decode the information. The overall tone of the book was positive and inspiring, which is how the writer encouraged the reader to emulate this attitude within their organization. Jack Hunter presents the information in a way that the reader can connect to their life.

Another strength of *Impactful Instructional Leadership* is that it is interactive and allows the reader to emerge within the book. Hunter asked the reader to reflect honestly and evaluate the areas they need to improve. The way the book is written allows the reader to feel it is a conversation rather than being lectured. Hunter used questionnaires and opened the question to guide the reader to find the areas where improvement is needed. The writer encourages the reader to reflect on what they have read and think about how they can apply it to their life. This will be more impactful as the reader will self-actualize, making what they have learned more functional in their life.

Jack Hunter's book is filled with valuable quotes that can help the reader to remember. However, it can become monotonous as the quotes often say the same thing but in different ways. Nevertheless, this can be positive because it allows the reader to find the quote that best speaks to them. Another weak point of the book is that the book often repeats the same points. While it can be good to repeat important information, it can become tedious to read and affect the reader's focus.



## **Comparison Fullan**

*Impactful Instructional Leadership* was presented that anyone could read and understand. On the other hand, Fullan's book *Leading in a Culture of Change* was technical and was directed to professionals. Jack Hunter's book explained all the technical terms so that the reader understood what he meant throughout the book. While strategies might be the same, the term used to describe them may differ in different school districts or countries.

Both Fullan and Hunter had a summary at the end of each chapter which helped the reader to understand the main points. Both authors understood the importance of changing the culture of the school. Changing the culture of a school can be difficult, and both authors noted this point, and having the right mindset is vital for the change to happen. The mindset of leadership can affect the way that the organization takes the change in the school's culture.

Fullan pointed out the importance of leadership not being a pacesetter or coercive. A leader that is a pacesetter is one that sets high standards. At the same time, a leader that is coercive is one that demands compliance (Fullan, 2020, p.2). Likewise, Hunter emphasized that leader should not force their staff. Instead, leaders should share their vision so they can work towards a goal. Both Hunter and Hunter highlighted the importance of leadership effectively communicating. Fullan showed that leadership should avoid being too charismatic as it can be seen as too political. Hunter also warns that if a leader does not effectively communicate, their information might not be received as intended.

The main difference between Fullan and Hunter's book is the overall tone and wording. Hunter's book focused on the school environment, while Fullan did not. Fullan compared schools to a business which readers might find confusing as it should not be viewed as such. He used terms like stakeholders and clientele to describe parents and students. A lot of the examples and distinctions that Fullan used were business connected, which can be confusing when you apply them to education. Hunter used business examples, but the examples were easy to understand and connected well to the topic of the chapter. Hunter's book used terminology that was connected to the school environment, which made his points easier to follow, as the book was about leadership in the education setting. However, Fullan did not use many educational terms.

Rather, he used many business terms instead, which can be confusing to the reader if they are unfamiliar with them.

Additionally, viewing a school as a business can take the humanity out of a school. A school should not be viewed as a business since it should not be only about getting tangible results like high test scores or being profitable. Rather a school is a place of learning that teaches students to love knowledge and to thrive in the world.

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## **Book Review: How to be an Inclusive Leader**

**Reviewed by Jennifer Schreiner**

Jennifer Brown is a successful LGBT entrepreneur, being founder and CEO of her own consulting company, Jennifer Brown Consulting. As a woman, lesbian, CEO and consultant that walks into fortune 500 companies to train individuals on diversity and inclusive workplace leadership is strong. She never stops feeling intimidated and insecure of her trainings to mega corporations, especially to individuals that are the opposite of her.

Jennifer Brown believes in the human potential; she believes in what she trains. She has seen, first-hand, how employees have changed companies around after feeling involved, acknowledged and part of the organization.

Focusing in on the importance of leadership and how an inclusive leader can make all the difference on how an organization fails or succeeds. Brown emphasizes on four developmental stages: unaware, aware, active and advocate. These four stages apply to all employees in the organization, from the CEO to the janitor, every person counts and must count for success to prevail. In her book she discusses these four stages and how each one of us can implement these stages into what we do in life. Walking the reader into a step-by-step instruction on how to understand these strategies, apply them to ourselves, create self-awareness and take action. These are not just strategies that will stay on the book but instead placed into practice and set out to try.

The main themes of this book concentrate on Fortune 500 companies and although Brown does mention education here and there in the book, it is not her main focus. Schools are Fortune 500 companies with students as high investments, all of the strategies mentioned in the book by Brown are powerful in the classroom making sure that all students in the school are seen, given a place in the community and involved from special education to general education. Not only between students but also between all of the staff that has a purpose and potential.

## **Main Themes**

*How to be an Inclusive Leader* understand that every organization is different, all scenarios, environments and employees are different. Therefore, bringing about “The Inclusive Leader Continuum” helps organizations point out where they are located in the continuum and what are the next steps that should be taken to start progressing and growing. Brown’s continuum is an ongoing re-evaluation of 4 steps: unaware, aware, active and advocate.

Phase one is “unaware” where the individual believes that diversity is compliance-related and tolerated. This comes off in phase one as someone else’s job not mine. This is also the stage and phase where you, as the reader, are beginning to understand the role of inequality in the workplace or at school. Becoming informed and aware of the problem is the first phase of recognition.

Phase two is “aware”. After the unaware is the aware. Aware step implements that you understand your role or position and are educating or informing yourself on the right information needed to move forward (Brown, 2019). This step does not indicate that you are “aware” of everything, it simply means that you are “aware” of the many things left needed to learn. In this step you are doing more self- research than in any other step and are focusing on yourself and working on self-acknowledgment like trying to understand where our own personal triggers, what causes discomfort and going over many missed opportunities. In this section it is recommended to shifting your perspective and understanding the privilege that other people without knowing. It is essential to work on yourself before providing work for others.

“Active” is taking that next initiative to apply the knowledge that you have, and you have learned. Putting into place the things that have been learned can be hard and uncomfortable at times. In the book Brown emphasizes that this will be the most uncomfortable stage because anything could be a trigger point to people, especially if something new is trying to be approached. Brown states that when trying to communicate these new ideas and/or strategies the key is resilience and humility (Brown, 2019). It is also made very clear that many times there will be push back or harsh feedback and if that is the case then not to feel unmotivated or discouraged but instead to keep pushing through and fighting for positive change.

“Advocate” is the last theme to Brown’s book. In this last phase you are not only a warrior but a constant warrior that is now making the staple in the organization. There can be many pros and cons to this phase. The cons could be that you are constantly on the lookout for improvement, you become aware of who to keep your eye on and you are now no longer feeling awkward about having those uncomfortable situations. You are a warrior for the organization and for the people. Brown makes it very important to point out that “no one travels through the continuum only once” (Brown, 2019). This means that situations are always evolving and throughout time we will constantly be finding ourselves traveling through these main themes repeatedly starting in different starting points. A good powerful leader finds themselves constantly moving through the journey of these main themes, especially starting in the unaware phase and taking the time to learn more from a new group and connecting with the community as a whole.

### **Key Quotes**

*“Rather than considering advocacy a destination, it’s better to see the continuum as a journey, one on which you try to make progress every day.”* (Pg.23) – This quote reflects Brown’s ideas on never stop learning. This proves the point that we should never consider ourselves as better or superior because we think we “know” more but instead find ways to keep learning and progressing.

*“Employees wrestle with all sorts of things that are never discussed but that steer their lives, their engagement, and their productivity.”* (Pg.63) – This quote of Brown’s spoke the highest as understanding that every individual is fighting their own battle and most of the time, we have no idea what the individual has in their mind or what they are dealing with. This quote is very meaningful and speaks powerfully to leaders and administration in trying to understand all the individuals around them and to take the time to get to know them better.

*“Showing vulnerability does not detract from a leader’s capacity to inspire people; rather, it augments it.”* (Pg. 86) – Many times the perception of a leader comes as an individual that does not make mistakes and is capable of things that other individuals are not, and, in this quote, Brown argues that this is not the case. The respected and connected leaders make mistakes and they use those mistakes as example to everyone else that mistakes are a part of who we are, and

we grow from them. This is a strong lesson to relearn and rewire ourselves to change our perception of the characteristics of a true leader.

*“If you only remember one thing from this book, remember that to be an inclusive leader, you need to do something.”* (Pg.110) - This quote defines the book of Brown in one sentence.

Throughout the book of how to be an inclusive leader the main point is to get out there and act on it. In life we cannot just be full of knowledge because without using that knowledge we lack wisdom. Being able to apply our changes and ideas are the only way we can organically become leaders. Doing something is the biggest act we can do without making a sound but instead making an impact. Whether having the title of a leader or not the act of doing something will make an impact of a natural leader to those around.

*“I’ve noticed that the most beloved leaders consider themselves students”* (Pg.114) - As mentioned in previous quotes the idea is to never stop learning and being a student reflects the act of learning. Being a leader is different from being a beloved leader, beloved leaders progress further and stay leaders because the people support them and stand with them. To be a leader and consider yourself a student is a sincere humbling act that allows individuals to be sincere and approach that leader with no intimidation. The saying of staying a student does not mean to take classes but instead to approach all things with an open mind and always have the ambition to learn something new and apply it.

### **Strengths and Weaknesses**

Jennifer Brown’s *How to be an inclusive leader* is a book to help bring about the light of diversity into the workplace. With Brown’s 4 step continuum she can broaden the aspect of making it possible for everyone to be inclusive leader. Starting off as unaware, getting informed into entering the aware stage, following the being active and advocate phase these steps are basic and accessible to all. She even provides a link to a self-assessment that will help the reader pinpoint where they stand in the continuum and what areas to focus on as a leader.

Through her book, Jennifer Brown, relates her experiences and personal life struggles and successes as an active member of the LGBT movement. She makes it very clear that without diversity and inclusive leading there will be failure. Her writing is very easy to understand, follow and read. Finding the positivity in everything Brown always reminds the reader the

importance of including every single person of the organization and finding the potential in everything and everyone.

Weakness of the book is found in the broadness of the subject. Brown's continuum is nothing out of this book and brings about strategies that have probably already been measured elsewhere. The book is very general and does not provide specific tools or details such as example exercises, topics to bring up in the workplace, activities, responses to when you feel there is injustice or how to collaborate better with your team.

Having the first two steps of the continuum being "unaware" and "aware" seemed too obvious and non-specific. The act of being unaware, collecting information and then being aware also seemed too broad. There should be a certification, degree or assessment to then move to the "aware" stage of the continuum. The question is then if anyone could grasp any information and consider themselves "aware". There are then the steps to be active and advocate. The book should follow through with step-by – step guidelines on how to be active and how to appropriately advocate in the workplace. Advocacy has become an "it" word and being able to advocate should come with experience, knowledge and wisdom.

### **Comparison to Fullan**

While *How to be an Inclusive Leader* focuses on the diversity of accepting the differences in all genders and beliefs, Fullan focuses on the culture aspect of people. To be informed of different diversity groups is different than being informed about different cultures, traditions, lifestyles, mentalities and more. Brown's book has a broad mindset of becoming informed on a subject, acting on it and then advocating for it. Fullan on the other hand digs deeper into the individual focusing on moral purpose, building relationships, creating deeper learning and understanding change.

Fullan's examples, descriptions, layouts and illustrations bring about step by step vivid detail on how to approach these different matters. His knowledge turns into wisdom by executing the contents into what fits the organization. The content is meant to be personalized and manipulated to benefit the reader and leadership team. Brown focuses on organizations and Fullan on leadership.

To take the time to take employees out of the workplace to build relationships and see differences it is stronger to bring a moral purpose to the meeting than knowledge. For beginners that would like an overview book on leadership would be Jennifer Brown on *How to be an Inclusive Leader* to take the initiative and get ready for the next step of actively making a difference Fullan has great knowledge on how to make an impact not just a statement.

### **References**

- Brown, J. (2019). *How to be an inclusive leader: Your role in creating cultures of belonging where everyone can thrive*. Oakland, CA: Berrett-Koehler Publisher, Inc.
- Fullan, M. (2020). *Leading in a culture of change*. Hoboken, NJ: Jossey-Bass.



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