ORGANIZING RESOURCES TO SUPPORT INCLUSION MODELS FOR STUDENTS WITH DISABILITIES
Organizing Resources to Support Inclusion Models for Students with Disabilities:

Executive Summary

Context

One in eight students in U.S. public schools have an Individualized Education Plan (IEP), making them eligible for special education services. And schools, educators, and families continuously work to provide students with disabilities with the additional supports, services, accommodations, and interventions that they need to learn and to thrive. But a combination of both real and perceived resource constraints, as well as the pressure to “do more” for students, means that schools may default to models that separate many students with disabilities from their peers for large portions of the school day (via pull-out services or sub-separate models) — and these models can inadvertently have detrimental effects for some.

So to best meet the needs of students with disabilities in the “least restrictive environment,” some schools turn to inclusion models, in which students with disabilities spend the majority of their day in the general education classroom, engaging in core instruction and receiving necessary special education services.

But designing and implementing high-quality, doable inclusion models requires shifts in how schools organize their time and money and how they determine staff members’ placements and responsibilities. Making these shifts can be challenging for schools — especially at the secondary level, due to diverse student needs, increasingly rigorous content, and complex staffing and scheduling models.

What We Learned

We studied secondary school inclusion models in four California charter schools, with support from the Bill & Melinda Gates Foundation. (Charter schools were the focus of this study, in part, because they tend to have flexibilities around resource-use that can provide an opportunity for learning in the field.) In each of these schools, educators at all levels have intentionally organized to ensure that students with a variety of disabilities learn in general education classrooms.

These schools have implemented inclusion models without larger investments of resources than similar schools that do not organize for inclusion models. We conducted this analysis to shed light on how secondary school leaders and their system-level partners can organize resources to implement inclusion models that benefit all students. From this work, we identified three sets of resource shifts that inclusion-focused schools employ:
1. **Shifting special education teachers and paraprofessionals into general education classrooms to support targeted group sizes.**

   The schools we studied have similar numbers of teachers and paraprofessionals as comparison schools, but they intentionally assign staff members to support an inclusion model. Specifically, case study schools:

   A. Invest in a comparable number of general education and special education teachers as comparison schools, though the number of paraprofessionals varies depending on their staffing strategy.

   B. Shift special education teachers and paraprofessionals from working in separate settings to working in general education settings.

   C. Maintain slightly larger average class sizes in order to enable smaller group sizes when all instructional staff are working with students in the general education setting.

2. **Investing in social-emotional and program management staff.**

   The schools we studied invest in positions that support an inclusion model, either by assisting instructional staff or by providing direct services to students, while trading off investments in other positions. In particular, case study schools:

   A. Invest in additional psychologists and mental health counselors to increase the amount of time these staff members can spend effectively assessing, monitoring, and counseling each individual student. This may mean investing less in some non-instructional staff positions, such as guidance counselors, librarians, and security monitors.

   B. Invest in special education program management staff to fulfill multifaceted roles that often include overseeing IEP processes, coordinating whole-child supports, and helping instructional staff meet the needs of students with disabilities. However, it should be noted that in some case study schools, these program management roles may be a function of both the schools’ inclusion models and the fact that they operate outside of a centralized system or network.

3. **Investing more in connected professional learning for all teachers around inclusion.**

   The schools we studied see connected professional learning — which includes significant time for expert-led collaboration, observation, and growth-oriented feedback — as core to overall instruction. Case study schools:

   A. Invest in additional instructional experts to coach, observe, and mentor teachers around inclusive pedagogy.

   B. Dedicate more time for collaboration, especially grade-level or content area planning, that is shared between general education and special education teachers.

   C. Invest less in traditional professional development activities, such as contracting with external providers and traveling to workshops or conferences.
Students are at the heart of decision-making and design. Every single IEP is an individual plan and incorporates not just academic ability but where they are socially, behaviorally, emotionally, and where they are with their own self-perception.

—Special education lead
This paper is built on the work of dozens of people, within and outside Education Resource Strategies (ERS). First, we are grateful to our partners at the schools we studied for finding the time to share their data, their insights, and their experiences with us during an unprecedented and tumultuous year. These partners include Kimberly Berry, Elaine Blasi, Jennifer Calvillo, Lisa Geigle, Erin Studer, and Nancy Ta.

We would also like to acknowledge the many ERS team members who contribute research, analyses, editing, and design support: Christopher Cleveland, Benjamin Hopkins, Torrie Mekos, David Rosenberg, and Ruby Shumaker. Finally, this work was made possible with the support of the Bill & Melinda Gates Foundation. The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of the foundation. ERS is solely responsible for the ideas presented in this paper and for any errors.
Background

Context

Approximately one in eight public school students in the United States and in California have been identified as having one of the 13 federally-recognized cognitive, behavioral, or physical disabilities.¹ Federal law supports the foundational premise that these students receive a “free and appropriate education” in the “least restrictive environment,” so that students with disabilities have experiences in school that are relatively consistent with those of their general education peers.²

For many students with disabilities, this implies an inclusion model — where they are served in general education settings for at least 80 percent of the school day, while still receiving the supports and services they need to meet their distinct needs.

In the United States, 64 percent of students with disabilities are served in inclusion settings, compared to 57 percent in California specifically. See Figure A below.

Figure A: Students with Disabilities in US and California (by setting)

Defining Inclusion

Inclusion models generally imply that two educators — including at least one with special education certification — work together to serve students with and without disabilities in the same setting. See Figure B below.

Figure B: Classrooms in Separate Models and Inclusion Models
Two inclusion models are prominent:

- **Co-teaching** occurs when a special education teacher and a general education teacher share the teaching responsibilities for a class that includes students with and without disabilities.

- **Push-in / itinerant support** involves specialists working closely with students in the general education classroom, providing specially-designed instruction or related services for targeted time periods, rather than an entire class or day.

This allows students with disabilities to spend the majority of their school day with their general education peers, in contrast to students with disabilities who are served for most or all of the day in separate settings. *See Figure C below.*

**Figure C: Sample Schedule for a 9th-Grade Student**

<table>
<thead>
<tr>
<th>40% of time spent in general education setting in a school not doing inclusion</th>
<th>100% of time spent in general education setting in a school doing inclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Breakfast</strong> (30 minutes)</td>
<td><strong>Breakfast</strong> (30 minutes)</td>
</tr>
<tr>
<td><strong>Period 1: ELA</strong> (90 minutes)</td>
<td><strong>Period 1: ELA</strong> (90 minutes)</td>
</tr>
<tr>
<td><strong>Period 2: Science &amp; Social Studies</strong> (90 minutes)</td>
<td><strong>Period 2: Science &amp; Social Studies</strong> (90 minutes)</td>
</tr>
<tr>
<td><strong>Lunch</strong> (30 minutes)</td>
<td><strong>Lunch</strong> (30 minutes)</td>
</tr>
<tr>
<td><strong>Period 3: Math</strong> (90 minutes)</td>
<td><strong>Period 3: Math</strong> (90 minutes)</td>
</tr>
<tr>
<td><strong>Period 4: Elective</strong> (90 minutes)</td>
<td><strong>Period 4: Elective</strong> (90 minutes)</td>
</tr>
<tr>
<td><strong>Advisory</strong> (30 minutes)</td>
<td><strong>Advisory</strong> (30 minutes)</td>
</tr>
</tbody>
</table>

The student receives core instruction in a sub-separate setting, taught by a special education teacher. They attend electives, meals, and advisory time with their general education peers.

The student spends all day, including core instruction time, in the general education setting. They are taught primarily by general education teachers, with the support of special education teachers and paraprofessionals.
Methodology

School Selection

This paper is based on a close study of the middle or high school grades in four charter schools in California that prioritize inclusion for students with disabilities:

1. **Aspire ATSA**
   *Aspire Alexander Twilight Secondary Academy*

2. **Caliber CMA**
   *Caliber Changemakers Academy*

3. **CHIME**
   *CHIME Institute’s Schwarzenegger Community*

4. **Silver Oak**
   *Silver Oak High Public Montessori*

An initial set of schools was recommended by California state special education officials and the Center for Learner Equity based on the schools’ reputations for inclusion. Then, schools were further selected based on the proportion of students from low-income backgrounds that they serve. CHIME was an exception to this selection criteria — although the school serves a lower proportion of students from low-income backgrounds, our team saw value in exploring the practices at CHIME because it is well-known for using an inclusion model.

In California, local education agencies in geographical regions join together to help deliver educational services — these service regions are called Special Education Local Plan Areas, or SELPAs. Schools included in this study were selected based on diversity across SELPAs because each SELPA funds special education differently and provides different levels of support to schools. For more information on SELPAs in California, see Appendix B.

"Some of my highest performing students in my class are students with IEPs."

—General education teacher
# Case Study Schools at a Glance

<table>
<thead>
<tr>
<th></th>
<th>Aspire ATSA</th>
<th>Caliber CMA</th>
<th>CHIME*</th>
<th>Silver Oak</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Location</strong></td>
<td>Sacramento, CA</td>
<td>Vallejo, CA</td>
<td>Woodland Hills, CA</td>
<td>Hayward, CA</td>
</tr>
<tr>
<td><strong>Authorizing District</strong></td>
<td>San Juan Unified</td>
<td>Vallejo City Unified</td>
<td>Los Angeles Unified</td>
<td>Hayward Unified</td>
</tr>
<tr>
<td><strong>Special Education Local Plan Area (SELPA)</strong></td>
<td>El Dorado County Charter (0951)</td>
<td>El Dorado Country Charter (0951)</td>
<td>Los Angeles Unified (1914)</td>
<td>Sonoma County Charter (4951)</td>
</tr>
<tr>
<td><strong>Grades</strong></td>
<td>6-12</td>
<td>K-8</td>
<td>K-8</td>
<td>9-12</td>
</tr>
<tr>
<td><strong>Grades Studied by ERS</strong></td>
<td>6-12</td>
<td>6-8</td>
<td>6-8</td>
<td>9-12</td>
</tr>
<tr>
<td><strong>Enrollment</strong></td>
<td>6-8 = 307</td>
<td>6-8 = 227</td>
<td>6-8 = 222</td>
<td>9-12 = 219</td>
</tr>
<tr>
<td></td>
<td>9-12 = 206</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Students with Disabilities</strong></td>
<td>16% (0%)</td>
<td>15% (0%)</td>
<td>28% (6%)</td>
<td>12% (0%)</td>
</tr>
<tr>
<td><em>(Students with Low Incidence Disabilities)</em></td>
<td>secondary school only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Students Eligible for Free or Reduced-Price Lunch</strong></td>
<td>secondary school only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>63%</td>
<td>70%</td>
<td>18%</td>
<td>87%</td>
</tr>
<tr>
<td><strong>Students who are English Language Learners</strong></td>
<td>secondary school only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>14%</td>
<td>19%</td>
<td>3%</td>
<td>26%</td>
</tr>
</tbody>
</table>

*While CHIME is an outlier in terms of its proportion of students who are eligible for free and reduced-price lunch and students who are English language learners, it was included in this study because it is well-known in California as a school that uses an inclusion model.*
Inclusion at Case Study Schools

All four schools exceed California’s average of 56.9 percent of students with disabilities who are served in the general education classroom at least 80 percent of the time. See Figure D below.

Figure D: Students with Disabilities, by Amount of Time Spent in the General Education Setting


All four schools serve comparable or larger proportions of students with disabilities than California overall, with comparable needs as defined by disability types represented. See Figure E below.

Figure E: Students with Disabilities by IDEA Disability Type

Inclusion at Case Study Schools [Continued]

Each school exhibits a unique journey to its current inclusion model, as some have innovated with their inclusion model for decades, while others have only recently begun to transition to inclusion models in recent years. However, studying the commonalities and differences across the schools’ strategies offers insights into how resources can be organized to facilitate inclusion.

Why does this case study focus on charter schools?

Charter schools often have different enabling conditions than their traditional public school counterparts. This means that they will not always be a perfect one-to-one model for other schools seeking to change the ways they structure inclusion models for students with disabilities. However, the differences in enabling conditions and flexibilities also provide an opportunity to explore how they use their resources and share learnings with the broader education field.

Additionally, this study focused on charter schools because, in general, charter schools are more likely to serve students in full-inclusion settings. Based on data from the National Center for Education Statistics and the Center for Learner Equity, the Bill & Melinda Gates Foundation estimates that in charter schools, 84 percent of students with disabilities spend at least 80 percent of their time in general education classrooms. However, it is not clear whether this is related to the types of diagnoses of students with disabilities at charter schools and/or because of an intentional preference in charter schools for serving students with disabilities in inclusion settings.
Interviews and Data Review

For our analysis, we conducted a combined total of 30 interviews with system- and school-level staff — including superintendents, principals, assistant principals, special education directors, general and special education teachers, psychologists, and counselors. We also reviewed an array of financial, human resources, scheduling, and student data from each case study school.

Note that while Aspire ATSA and Caliber CMA use ‘education specialists’ and ‘instructional assistants’ to describe certain staff positions; ‘special education teachers’ and ‘paraprofessionals,’ respectively, are used throughout this paper for consistency.

Defining ‘Comparison’ Schools

Throughout this paper, we reference ‘comparison’ schools and districts to elicit comparisons between other schools and case study schools. This characterization of a comparison school is based on data from eight large, urban public school districts that ERS has partnered with in the past, each of which gave us access to financial, human capital, course scheduling, and demographic data. Financial data has been adjusted to account for regional differences. We selected these eight districts based on the recency of the data and per-pupil funding levels that were neither exceptionally high nor low relative to average per-pupil funding in California once adjusted for regional differences. We then narrowed the schools included in the comparison dataset to middle and high schools with student enrollments below 1,000 to more closely resemble the case study schools. 272 schools met these conditions and are included in our comparison averages. Throughout this paper, we also make comparisons to the state of California overall, using publicly available data from the California Department of Education.

“From a resource standpoint, I honestly think it [inclusion] can just be about reconfiguring your current resources.”

—Regional special education teacher
Overview of Findings

We conducted this analysis to shed light on how secondary school leaders and their system-level partners can organize resource to implement inclusion models that benefit all students. From this work, we identified three sets of resource shifts that inclusion-focused schools employ:

1. Case study schools shift special education teachers and paraprofessionals into general education classrooms to support targeted group sizes.

2. Case study schools invest in social-emotional and program management staff.

3. Case study schools invest more in connected professional learning for all teachers around inclusion.
Finding #1

Case study schools shift special education teachers and paraprofessionals into general education classrooms to support targeted group sizes.

Case study schools have similar numbers of teachers and paraprofessionals as comparison schools, but they intentionally assign staff members to support an inclusion model. Specifically, the schools we studied used their resources in three main ways:

Finding #1A

Case study schools invest in a comparable number of general education and special education teachers as comparison schools, though the number of paraprofessionals varies depending on their staffing strategy.

Exploring the staffing data of case study schools reveals that inclusion generally does not require more instructional staff than more separated models for serving students with disabilities. See Figure 1.1 on the next page.

Relative to the student population, the total full-time equivalent (FTE) of teachers (including both general education and general education teachers) at case study schools is comparable to comparison schools. For example, in Figure 1.1, the average total teacher FTE per 500 students at case study schools is 30.8 — similar to the 29.6 FTE per 500 students in comparison schools. Moreover, in three of the four case study schools, the total special education teacher FTE is lower than the 5.3 FTE per 500 students at comparison schools.

"[At CHIME] students with disabilities have full class membership and are a meaningful, important part of their society. There is no other way to do school."

—Assistant principal
Deeper insight about special education staffing at the case study schools can be drawn from the following ratio:

\[
\frac{\text{Percentage of teachers assigned to special education}}{\text{Percentage of students identified as students with disabilities}}
\]

This ratio shows that case study schools staff fewer special education teachers relative to the population of students with disabilities than comparison schools do. See Table 1.2 below. At comparison schools, 18 percent of teachers are assigned to special education, and 12 percent of students are identified as students with disabilities, leading to a ratio of 1.5. At case study schools, these ratios are lower (between 1.0 and 1.1). This implies that since relatively fewer special education teachers are serving students with disabilities, general education staff, support personnel, and other service providers are taking greater responsibility for educating students with disabilities in an inclusion setting.

Table 1.2

<table>
<thead>
<tr>
<th></th>
<th>Comparison School</th>
<th>Aspire ATSA</th>
<th>Caliber CMA</th>
<th>CHIME</th>
<th>Silver Oak</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of teachers assigned to special education</td>
<td>18%</td>
<td>17%</td>
<td>15%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>% of students identified as having a disability</td>
<td>12%</td>
<td>16%</td>
<td>15%</td>
<td>28%</td>
<td>12%</td>
</tr>
<tr>
<td>Ratio</td>
<td>1.5</td>
<td>1.0</td>
<td>1.0</td>
<td>1.1</td>
<td>1.0</td>
</tr>
</tbody>
</table>
Looking at the numbers of special education educators relative to only the population of students with disabilities confirms that special education staffing is generally lower at the inclusion-focused case study schools than at comparison schools. See Figure 1.3 below. All four case study schools have fewer special education teachers relative to students with disabilities than the comparison school average (7.8 FTE per 100 students with disabilities). While CHIME appeared to invest more in special education teachers in Figure 1.1, when scaling to account for 28 percent of its students being identified as having a disability, Figure 1.3 illustrates that its special education teacher staffing (7.3 FTE per 100 students with disabilities) is lower than comparison schools and is comparable to other case study schools.

**Figure 1.3: Breakdown of Special Education Instructional Staff FTE / 100 SWD**

<table>
<thead>
<tr>
<th></th>
<th>Special Education Teacher</th>
<th>Paraprofessional</th>
<th>Total FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comparison School</td>
<td>5.6</td>
<td>7.8</td>
<td>13.4</td>
</tr>
<tr>
<td>Case Study School Average</td>
<td>4.5</td>
<td>6.4</td>
<td>10.9</td>
</tr>
<tr>
<td>Aspire ATSA</td>
<td>1.2</td>
<td>6.0</td>
<td>7.2</td>
</tr>
<tr>
<td>Caliber CMA</td>
<td>5.9</td>
<td>5.9</td>
<td>11.8</td>
</tr>
<tr>
<td>CHIME</td>
<td>7.3</td>
<td>7.3</td>
<td>14.6</td>
</tr>
<tr>
<td>Silver Oak</td>
<td>6.3</td>
<td>6.3</td>
<td>12.6</td>
</tr>
</tbody>
</table>

Only CHIME has a higher number of special education educators overall (18.1 FTE per 100 students with disabilities), as a result of its paraprofessional staffing model. This greater staffing investment may result from a greater number of service minutes outlined in students’ IEPs due to their perceived needs. (For example, Figure E in the Methodology section of this paper shows that 26 percent of students with disabilities at CHIME have autism.) Still, it is worth noting that regardless of the extent to which case study schools use paraprofessionals as part of their model, the number of special education teachers remains consistent.

Paraprofessional staffing is much less consistent than teacher staffing across the case study schools. See Figure 1.4 on the next page. CHIME stands out as investing the most in paraprofessionals, with its 36.0 paraprofessional FTE per 500 students, exceeding that of its teachers (33.8 FTE per 500 students). On the other hand, Silver Oak does not invest in paraprofessional positions at all. Notice that at Aspire ATSA and CHIME, the proportion of general education paraprofessionals is much greater than at comparison schools.
Further, paraprofessionals at case study schools support all students in the inclusion classroom, whereas at comparison schools paraprofessionals often support individual students with disabilities, and often in settings that are separate from the general education classroom. To help support this approach, case study schools have general education staff and special education staff (including both teachers and paraprofessionals) participate in professional learning side-by-side. However, we have identified understanding what paraprofessionals’ day-to-day work supporting students with disabilities looks like, as well as the types of training and support they receive, as areas that would be particularly valuable for further exploration and learning.

Figure 1.4: Breakdown of Paraprofessional FTE / 500 Students

- Comparison School: 12% SWD, 5.3 FTE
- Case Study School Average: 18% SWD, 11.8 FTE
- Aspire ATSA: 16% SWD, 6.9 FTE
- Caliber CMA: 15% SWD, 4.4 FTE
- CHIME: 28% SWD, 36.0 FTE
- Silver Oak: 12% SWD, 0.0 FTE

Legend:
- Blue: Special Education
- Green: General Education
Finding #1B

Case study schools shift special education teachers and paraprofessionals from working in separate settings to working in general education settings.

Only when an inclusion-focused school adopts a different strategy for serving students with disabilities (such as CHIME’s paraprofessional model described in Finding #1A) does the shift from serving students with disabilities separately to an inclusion model use additional personnel. All special education staff are assigned to inclusion settings at the case study schools — in comparison schools, special education staff are spread across inclusion and separate or self-contained settings. See Figure 1.5 below. Shifting instructional staff from substantially separate settings to inclusion settings appears to enable a lower investment in special education teachers and paraprofessionals; on average, case study schools have 6.4 teacher FTE and 4.5 paraprofessional FTE per 100 students with disabilities, compared to a comparison school which has a total of 7.8 teacher FTE and 5.6 paraprofessional FTE per 100 students with disabilities.

Figure 1.5: Special Education Instructional Staff FTE / 100 SWD, by Setting

*The proportion of teacher FTE in substantially separate settings at comparison schools is based on data from the ERS District Database. The proportion of paraprofessional FTE in substantially separate settings at comparison schools is an estimation accounting for the likelihood that more paraprofessionals are assigned to substantially separate settings as 1:1 aides for students with disabilities.*
Finding #1C

Case study schools maintain slightly larger average class sizes in order to enable smaller group sizes when all instructional staff are working with students in the general education setting.

Because case study schools shift special education staff and students with disabilities from substantially separate to inclusion settings without hiring additional teachers, their class sizes tend to be slightly larger than general education class sizes in comparison schools. See Figure 1.6 below.

However, student group sizes are often smaller at case study schools than in comparison schools because more than one educator is regularly in the classroom. (See Figure B in the Background section of this paper as an example.) For example, when co-teaching is happening in one of the case study school classrooms, the average student group size is 13 because two educators teach in an inclusion classroom with 26 students. In contrast, at comparison schools, the average group size is 24 students in the general education classroom and 10 students in the substantially separate classroom, because one educator teaches in each setting.

Figure 1.6: Average Secondary Class Size and Co-Teaching Group Size by Setting
Finding #1

Highlights from Case Study Schools

Silver Oak

Silver Oak has two special education teachers, one of whom also serves as the school’s special education director to meet the needs of the school’s 26 students with disabilities. The staffing model does not include any paraprofessionals; such positions only exist when a student’s IEP requires a full-time aide. The special education teachers mostly provide push-in services to students with disabilities, and occasionally use a ‘study room’ for specific pull-out interventions depending on students’ goals, needs, and preferences. Because Silver Oak follows Montessori’s independent learning model, where the latter half of the two-hour block schedule is reserved for independent or group work, special education teachers can provide interventions for students with disabilities without disrupting the direct instruction or content delivery they receive in the general education classroom.

Caliber CMA

Caliber CMA has a similar number of students with disabilities as Silver Oak. At Caliber CMA, two special education teachers work with the middle school grades, and there are two special education paraprofessionals. The predominant instructional model is push-in support with some co-teaching. The special education teachers are departmentalized, each working with only two general education teachers and leveraging their content expertise to share responsibilities for direct instruction.

“...It’s more natural to work with the general education teacher this way. Even though they deliver the bulk of the instruction, it’s expected that I will reteach things using a different strategy.

- Special education teacher at Caliber CMA

The paraprofessionals generally push into the opposite classes as the special education teachers, so that additional support for students with disabilities is always available. A few students with low incidence* intellectual disabilities receive pull-out services in a ‘lab class’ for one or two hours of the day to work on specific IEP goals, and spend the rest of their time in the general education classroom.

*‘Low incidence’ disabilities are typically those requiring the support of highly-specialized staff.
Aspire ATSA

Aspire ATSA has five departmentalized special education teachers who each have a **caseload of students**. These caseloads are created using a points system that measures students’ varying levels of need. The teachers push-in to the classes where their caseload students are learning, implementing the plans made by that department’s special education teacher. In line with practices widely adopted by their charter management organization (CMO), Aspire ATSA has begun to use co-teaching as a way to strengthen their full inclusion model, which one teacher described like this: “the general education teacher is the content specialist, and the special education teacher is the instructional specialist.”

Together, teacher pairs select from **four co-teaching models** to use depending on the lesson, students’ needs, and their personal dynamic:

1. **Team Teaching**: Both educators lead direct instruction for the whole class at the same time.
2. **Parallel Teaching**: Each educator takes half of the class and they both teach the same content simultaneously.
3. **Alternative Teaching**: One educator teaches the majority of the class while the other instructs a small group in a more specialized way, based on data and observations of students’ skills.
4. **Station Teaching**: Each educator teaches different content and groups of students rotate between them.

Additionally, there are some special education paraprofessionals that provide one-on-one support to students with moderate or severe disabilities.

**CHIME**

Although there are similarities in how special education staff provide services to students with disabilities, CHIME’s **staffing model** varies from the other case study schools. Notably, there is approximately one paraprofessional per classroom, a higher investment than in other case study schools. CHIME also has a special education assistant role*, filled by staff members who are usually former paraprofessionals and have a demonstrated capability for taking on additional responsibilities, such as participating in departmental planning meetings. Aside from the staffing differences, all students with disabilities at CHIME, including those with low incidence disabilities, are served in inclusion settings through a combination of push-in services and co-teaching. Special education teachers usually work across three to four general education classrooms — based on their student caseload, they switch between the team, parallel, alternative, and station co-teaching models described above. More experienced general education teachers may teach some classes without a special education co-teacher, since their familiarity with inclusion enables them to independently differentiate instruction and accommodate students’ needs.

*In Figures 1.3, 1.4, and 1.5, CHIME’s special education assistants are counted as paraprofessionals because they are not certified teachers.
Finding #2

Case study schools invest in social-emotional and program management staff.

Case study schools invest in positions that support an inclusion model, either by assisting instructional staff or by providing direct services to students, while trading off investments in other positions. Specifically, the schools we studied used their resources in two main ways:

Finding #2A

Case study schools invest in additional psychologists and mental health counselors to increase the amount of time staff can spend effectively assessing, monitoring, and counseling each individual student. This may mean investing less in some non-instructional staff positions, such as guidance counselors, librarians, and security monitors.

Psychologist and mental health counselor staffing at each case study school relative to their overall student population is greater than the staffing in schools from our comparison dataset. See Figure 2.1 below. This greater investment (1.3 to 3.7 FTE per 500 students, compared to 0.5 FTE per 500 students) results from the decision made by all four case study schools to separate the traditional responsibilities of a school psychologist into two distinct positions: one that focuses solely on assessment, and one that focuses on counseling. Sometimes, there are several people in each role.

Figure 2.1: Psychologist & Mental Health Counselor FTE / 500 Students
At the case study schools, the psychologist(s) is responsible for: conducting assessments to identify students with disabilities and to determine the services that appropriately meet their needs; contributing to the IEP process and collaborating with instructional staff on suitable interventions; monitoring students’ progress and re-assessing students to adjust their IEP and service as needed. Meanwhile, the role of the mental health clinician(s) and/or social emotional counselor(s) is dedicated to providing one-to-one or small group counseling to students with and without IEPs, and overseeing schoolwide wellness programs and initiatives.

To invest more in additional psychologists and mental health counselors, case study schools generally made a tradeoff of investing less in some non-instructional staff positions, which drives lower per-student spending in certain areas, such as guidance counseling, library and media services, and security and safety. See Figure 2.2 and Table 2.3 below. Removing or reducing the following positions may be a tradeoff that enables the case study schools to invest in special education program management staff, psychologists, and mental health counselors.

- **Guidance counselors:** Three of the four case study schools have fewer academic guidance counselors per 500 students than comparison schools (two do not have the position at all).
- **Librarians:** Only one of the case study schools has a librarian on staff, compared to an average of 0.6 librarian FTE per 500 students at comparison schools.
- **School security monitors:** Two of the four case study schools do not invest in school security monitor positions, while comparison schools have an average of 1.2 school security monitor FTE per 500 students.

*In this study, we did not further explore the implications of these tradeoffs on guidance counselor supports (such as post-secondary guidance), librarian supports (such as checking out books or researching information), or student safety.*

**Figure 2.2: Non-Instructional FTE / 500 Students**

<table>
<thead>
<tr>
<th></th>
<th>Comparison School</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
<th>School D</th>
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<tr>
<td>guidance counseling</td>
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<td>$158</td>
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<td>library &amp; media services</td>
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<td>security &amp; safety</td>
<td>$189</td>
<td>$218</td>
<td>$0</td>
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<td>$113</td>
</tr>
</tbody>
</table>
Finding #2A

Highlights from Case Study Schools

CHIME

At CHIME, psychologists divide their time between assessment and counseling, similar to typical practice. Two psychologists are shared between two school sites—they split their time equally so that a psychologist is present on each campus at all times. Each has their own counseling caseload composed of individuals, small groups, and entire classes. They collaborate with teachers and families and are heavily involved throughout the IEP process. In addition to the psychologists, a separate counselor provides designated instructional services (DIS), which include social-emotional and mental health counseling for students who have such services written into their IEPs.

Silver Oak

Silver Oak contracts with a psychologist to focus exclusively on assessment and identification. However, the school also has a full-time, in-house mental health clinician who provides counseling for students and orchestrates wellness programming. The mental health clinician also works alongside the school’s academic counselor to meet students’ wellness and academic needs, and collaborates closely with the special education team on interventions and IEP services.

Aspire ATSA

Aspire ATSA invests more in counselor positions than psychologist positions, given that the former serves all students while the latter is generally special education-focused. One psychologist splits their time across three school sites in the Sacramento area, conducting all assessments for students with disabilities. Additionally, a full time social emotional counselor and a part time (0.5 FTE) mental health counselor are responsible for counseling and wellness programming at Aspire ATSA.

Caliber CMA

Of all the case study schools, Caliber CMA has the greatest staffing investment in its social-emotional learning program, including psychologist and counselor positions. First, one psychologist and one psychologist intern are shared across both of Caliber’s school sites to conduct all assessments. Then, at CMA specifically, there is a team of four full-time clinicians (each spending about one-third of their time working with the middle school students and staff) who support all students by providing interventions, counseling, mental health therapy, and social work. Each clinician is also attached to a set of grade levels, to provide extra support to teachers and handle in-class referrals. The clinicians guarantee formal and informal services can be provided to all students, at any time, on an as-needed basis. Furthermore, a full-time lead behavioral interventionist (not included in Figure 2.1 because such positions could not be identified in the comparison data) is a member of the social-emotional learning team, generally working with students with disabilities who have behavioral plans and other supports written into their IEPs.
Finding #2B

Case study schools invest in special education program management staff to fulfill multifaceted roles that often include overseeing IEP processes, coordinating whole-child supports, and helping instructional staff meet the needs of students with disabilities. However, it should be noted that in some case study schools, these program management roles may be a function of both the schools’ inclusion models and the fact that they operate outside of a centralized system or network.

The case study schools are all charter schools — two sit within charter management organizations (CMOs) and two run as single site operators (SSOs). Three of the four case study schools (the single or small network operators) invest significantly more in special education program management staff than traditional public schools in comparison districts. See Figure 2.4 below. Caliber CMA, for example, has 2.44 special education program management FTE per 100 students with disabilities, compared to only 0.40 FTE per 100 students with disabilities in comparison schools. In comparison districts, special education program management staff are mostly situated at the central office and oversee the special education program for several schools. Such positions account for 0.38 of the 0.40 average FTE per 100 students with disabilities in our comparison database. Occasionally, dedicated special education program management staff may be based at the school-level. This was the case for only 37 of the 272 small secondary schools in our comparison data.

The Aspire CMO more closely resembles a comparison district, since it benefits from the scale of 38 schools, whereas the Caliber CMO is perhaps more comparable to a SSO, since it is composed of only two school sites. Aspire ATSA’s special education program management staffing (0.38 FTE per 100 students with disabilities) is consistent with comparison districts (0.40 FTE per 100 students with disabilities). However, Caliber CMA, CHIME, and Silver Oak all have much higher ratios of special education program management staff relative to their populations of students with disabilities. The higher ratios appear to be a function of both the schools’ inclusion models and their operation outside of a system or network. These additional non-instructional special education staff support an inclusion model by shouldering responsibilities such as scheduling and coordinating instructional staff, organizing professional learning and conducting observations, leading committees and collaboration across departments, and overseeing data collection and compliance.

Figure 2.4: Special Education Program Management Staff* FTE / 100 SWD

*‘Special education program management staff’ includes all non-instructional special education staff, such as directors, program managers and specialists, IEP coordinators, paraprofessional coordinators, and secretaries, clerks, or other administrative assistants who are attached to the special education program. These staff members are usually responsible for scheduling and coordinating staff, organizing professional learning, conducting observations, leading committees, facilitating collaboration across departments, and overseeing data collection and compliance.
Aspire ATSA
Aspire ATSA has only one position of this type, the special education program specialist, who is shared between four schools in the Sacramento area. The program specialist acts as the intermediary between the special education director at the Central Valley regional office and the special education teachers at ATSA. Key responsibilities include oversight and compliance relating to the special education program, and providing different levels of support to special education teachers depending on their experience and skillsets. Furthermore, alongside the ATSA principal, the special education program specialist conducts biweekly observations of each teacher to help develop the school’s co-teaching practices, and helps to organize professional learning for general and special education teachers alike.

Caliber CMA
Caliber CMA’s special education program specialist isn’t shared across school sites, but reports to the director of special education and student services at the network office, similar to Aspire ATSA’s structure. The special education program specialist is a full member of CMA’s leadership team and has a close working relationship with the principal. They oversee the special education program, manage compliance, check IEPs, and serve as a coach to most of the special education teachers and paraprofessionals. One additional position at the school-level directly supports the special education program: the bilingual administrative assistant for special education. This staff member executes a lot of the administration and logistics associated with special education, including scheduling IEP meetings, facilitating family outreach, and translating for Spanish-speaking families during IEP meetings or student-led conferences.

CHIME
CHIME’s special education program management staff differs from the other case study schools in that there is no special education program specialist or director, but rather one special education teacher who acts as the special education lead. This teacher spends about half of their time on program administration and oversight, and the other half in the classroom. They are supported by other administrative staff, similar to Caliber CMA. An IEP coordinator takes on most responsibilities around scheduling, data, and compliance. A paraprofessional coordinator oversees the onboarding, staffing, and professional learning of CHIME’s extensive paraprofessional staff. Both coordinator positions are full-time, however the larger population of students with disabilities at CHIME means the staffing ratio is smaller than that of Caliber CMA.
Silver Oak

Silver Oak employs a model similar to CHIME, but without the additional coordinators. The special education director is primarily a special education teacher, providing direct services and co-teaching in the classroom. However, they also coordinate the special education department and oversee IEP processes, including conducting preliminary assessments before referring students to a contracted psychologist, writing IEPs, communicating with families, and monitoring students’ progress.
Finding #3

Case study schools invest more in connected professional learning for all teachers around inclusion.

Case study schools view connected professional learning — which includes significant time for expert-led collaboration, observation, and growth-oriented feedback — as core to overall instruction.

Finding #3A

Case study schools invest in additional instructional experts to coach, observe, and mentor teachers around inclusive pedagogy.

Each school we studied embodies attributes of the connected professional learning model described in our 2017 publication, *Igniting the Learning Engine*. This includes significant investment in instructional experts (such as administrators, coaches, and teacher-leaders) who facilitate collaborative planning, regularly observe teaching, and provide non-evaluative, growth-oriented feedback to teachers and staff. It also includes increased teacher planning time, especially for instructionally-focused collaboration.

Instructional experts at each of these case study schools are assigned to support significantly fewer teachers than their peers in comparison schools. See Figure 3.1 on the following page. For example, Silver Oak has 9.1 teacher FTE for every one instructional expert FTE; in comparison schools there are 30.5 teacher FTE for every one instructional expert FTE. Having a greater number of staff serve in instructional expert roles (relative to the number of teachers) likely means teachers can receive more support and guidance as part of their professional learning and development. The interviewees (which included CMO central office staff, school leaders, and teachers) felt that this dynamic can be especially impactful when teachers benefit from expertise around inclusion; the instructional experts in case study schools regularly conduct observations and provide feedback and coaching around serving students with disabilities in an inclusion setting. This mentorship of instructional staff, combined with intentional hiring practices, builds teachers’ knowledge and skills and improves the experiences of students with disabilities in inclusion settings.
Figure 3.1: Teacher per Instructional Expert*

<table>
<thead>
<tr>
<th>Less Support</th>
<th>More Support</th>
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</thead>
<tbody>
<tr>
<td><strong>Comparison School</strong></td>
<td><strong>30.5</strong></td>
</tr>
<tr>
<td><strong>Case Study School Average</strong></td>
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<tr>
<td><strong>CHIME</strong></td>
<td><strong>10.8</strong></td>
</tr>
<tr>
<td><strong>Silver Oak</strong></td>
<td><strong>9.1</strong></td>
</tr>
</tbody>
</table>

*Instructional experts are defined in comparison schools as all principals, assistant principals and academic deans, and instructional coaches. We assume that staff in each of these positions spend 0.1, 0.15, and 0.75 of their time on instructional expertise, respectively. In case study schools, instructional experts are defined as all principals, assistant principals and academic deans, and instructional coaches (as above), plus all teacher leaders/mentors and special education program management staff who support teacher professional learning (this level of detail was not available for comparison schools). We assume that staff in leader/mentor and program management positions spend 0.25 and 0.5 of their time on instructional expertise, respectively.
Finding #3A

Highlights from Case Study Schools

Aspire ATSA

Aspire ATSA has no distinct instructional coach position, but school leaders and team leads serve as instructional experts, conducting regular classroom observations and providing inclusion-oriented coaching. The principal and special education program specialist commit to observing and delivering feedback to all general education teachers and their special education co-teachers twice a month. These observations focus on their co-teaching practices and effectively supporting all students, especially students with disabilities. The co-teaching committee then uses these insights to determine the content of professional learning sessions. They also synthesize feedback across teachers and share trends and highlights in a staff newsletter. In addition to the principal, special education program specialist, and other school leadership staff, three content area leads (for math, science, and humanities) provide additional coaching to teachers in their departments.

CHIME

CHIME does not have a distinct instructional coach position — instead, it operates an in-house mentoring program that supports all new teachers. General and special education teachers who are new to CHIME are assigned a mentor (an experienced teacher at the school who is not in their content area or grade-level team) for their first two years at the school. Mentors observe new teachers approximately six times per year and provide coaching around serving students with disabilities. Special education mentors also review new teachers' IEP processes and provide feedback on IEP writing in particular.
Silver Oak

Silver Oak has a dedicated instructional coach who works one-on-one with all teachers to differentiate their curricula and lesson plans to accommodate the needs of students with disabilities. Every teacher is required to create a study guide for each of their classes, outlining all of the assignments and assessments, and specifying the different choices students will have to demonstrate their learning. The instructional coach provides guidance on these study guides, with an emphasis on accommodations for students with disabilities. The instructional coach also conducts observations for each teacher once per month, providing feedback and coaching them on their instruction in an inclusion classroom.

Caliber CMA

Caliber CMA has an instructional coach dedicated entirely to the middle school grades, and other school leadership staff act as instructional experts for different departments. The instructional coach, while supporting all teachers, supervises the humanities and ELA staff; the assistant principal supervises the math and science teachers; and the special education program specialist oversees most of the special education teachers and paraprofessionals. These instructional experts observe teachers’ instruction weekly and give feedback to staff in biweekly check-ins, during which they design development plans and collaborate on accommodations, scaffolding, or differentiation to support students with disabilities. The middle school instructional coach also works closely with the person in the same position at the CMO’s other campus to design scopes and sequences and share best practices on how to coach teachers around inclusion.
Finding #3B

Case study schools dedicate more time for collaboration, especially grade level or content area planning, that is shared between general education and special education teachers.

Teachers in the schools studied work a longer school day and year than teachers in comparison schools. (It is worth noting, however, that they are not compensated more than their peers in comparison schools. See Table X3 in Appendix A for more information.)

At case study schools, a greater proportion of teachers’ time is dedicated to connected professional learning. See Figure 3.2 below. Perhaps most notably, Figure 3.2 shows that teachers in case study schools spend an average of 192 hours per year doing collaborative planning with their content area, grade level, or co-teaching colleagues, compared to 28 hours per year in comparison schools; this equates to 12 percent and 2 percent of their time, respectively. At case study schools, this time is almost always shared between both general education and special education staff, allowing them to collaborate on practices that will benefit students with disabilities in an inclusion classroom.

Similarly, teachers at case study schools spend more time in professional learning days before or after the school year (74 hours per year) than their peers in other schools (28 hours per year) — whether these days are hosted by individual case study schools or their charter networks, both general education and special education teachers are involved, and content is geared toward inclusion.

Lastly, teachers in case study schools also have more time for individual planning and case management (266 hours per year, compared to 166 hours per year in comparison schools). In several case study schools, this individual preparation, planning, or case management time is aligned with that of colleagues, so that it can be used for additional collaboration if needed.

Figure 3.2: How Teachers Spend Their Time, as a Percent of Annual Hours
Finding #3B

Highlights from Case Study Schools

Silver Oak

Silver Oak’s early release Wednesday creates time for a weekly two-hour faculty meeting. These meetings include all general and special education teachers. The time is used for professional learning three times per month, and for grade-level collaboration once per month. Co-planning between co-teacher pairs is done on an ad-hoc basis throughout the week, made possible by the school’s small size (and thus small number of staff), and the fact that all general education teachers teach for two blocks per day and plan during the third. With a two-hour period dedicated to planning each day, special education teachers can set up planning meetings with their co-teacher at a mutually convenient time during the week.

Aspire ATSA

On their early release Wednesdays, Aspire ATSA holds departmental collaborative planning meetings embedded into the 2.5-hour block, with the rest of the time spent in schoolwide professional learning sessions. Co-teaching pairs meet throughout the week, either during prep periods or after school, for one or two 30-minute meetings.

Caliber CMA

Caliber CMA’s approach resembles both Silver Oak and Aspire ATSA in that early release days are used primarily for professional learning sessions. The 2.25-hour blocks on Friday afternoons are usually led by school leaders (sometimes an external guest speaker delivers a session), and include all general education teachers, special education teachers, and paraprofessionals. Caliber CMA differs, however, in that collaborative time is more formally scheduled. There are several weekly meetings during or after the student school day: one hour for content area collaboration, one hour for grade-level collaboration, and a 45-minute meeting for content area teachers in the same grade level to collaborate. Special education teachers are invited to all of these meetings — however because they work across grade levels, scheduling limitations may preclude them from attending all three. However, co-teaching pairs meet for one or two additional 45-minute meetings per week, either to do data dives or to align on instruction.

CHIME

In contrast to the other case study schools, CHIME dedicates the 2.5-hours on its early release days exclusively to departmental collaborative planning meetings, which include all general education teachers, special education teachers, and special education assistants in each content area. Twice monthly, half of the block is repurposed for grade-level team meetings. With these Tuesday afternoons prioritizing collaborative planning, one-hour professional learning sessions are scheduled monthly afterschool on Thursdays, instead.
Finding #3C
Case study schools invest less in traditional professional development activities, such as contracting with external providers and traveling to workshops or conferences.

Three of the four case study schools spend less per student on traditional professional development than comparison schools. See Table 3.3 below. This is driven by lower spending on contracts for external professional development providers and on travel to workshops or conferences. Rather than investing in these types of professional development activities, case study schools focus on providing job-embedded professional learning via collaborative planning time (Figure 3.2) and observation and feedback from in-house instructional experts (Figure 3.1).

Table 3.3

<table>
<thead>
<tr>
<th></th>
<th>Comparison School</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
<th>School D</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ per-pupil on traditional professional development*</td>
<td>$209</td>
<td>$241</td>
<td>$67</td>
<td>$59</td>
<td>$79</td>
</tr>
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*Excludes the cost of instructional coaches, who are included in dollars per-pupil toward ‘instructional experts.’

Some of it doesn’t cost extra money — it just involves including special education specialists in collaborative planning time.

—Associate superintendent
Financing the Resource Shifts

In this section, we highlight some of the financial context of the case study schools resulting from the decisions and resource shifts school leaders are making to greater enable inclusion.

By coding budget line items to the three main resource shifts outlined in this paper, we observed the average investments and savings that case study schools make relative to typical schools to facilitate inclusion, while also operating on a lower-than-typical budget (as shown in Figure 1.1 earlier in this paper).

Average spending differences fall into three categories:

1. **Case study schools, all of which are charters, spend less per student than comparison schools.**
   
   *See Appendix A, Figure X1.* One case study school spends only slightly less than comparison schools, which on average spend $11,825 per student. However, three of the four case study schools spend between $2,200 and $3,700 less per student than comparison schools. Variation in spending across the case study schools is a result of different revenue sources (some schools receive more federal, state, or local funding due to differences in the student population — for example, Title I funds), as well as different non-operating costs — expenditures such as property rental, retirement benefits, and network oversight fees are excluded from our calculated dollars per student.

2. **Case study schools finance their inclusion strategies primarily by shifting positions.**
   
   *See Figure F.1 on the next page.* Figure F.1. shows that the additional investments in special education program management staff, psychologists and mental health counselors, and instructional experts is offset by savings in guidance counselors, librarians, and school security monitors. The investment in teacher staffing is comparable to comparison schools (+ $30 per student), although average teacher compensation is lower. *See Appendix A, Table X3.* The investment in paraprofessional staffing is generally comparable to comparison schools, although appears significant due to CHIME’s model.

3. **Aside from staffing, case study schools save funds by spending less on traditional professional development (~ $98 per student).**
   
   In conclusion, the financial cost of doing all the noted resource shifts for case study schools is less than $250 per student on average.
Figure F.1: Average $ Per-Pupil Savings and Investments of Case Study Schools, Compared to Comparison Schools
Implications for Districts and Schools Interested in Inclusion

For some students with IEPs, an inclusive learning environment is more appropriate than a self-contained or substantially separate setting — **but districts need to know which resources to use and how to target them strategically in order to implement inclusion models effectively.**

The infusion of **Elementary and Secondary School Emergency Relief (ESSER) funding** (and the three year investment window for these funds) creates unprecedented opportunities for school and system leaders to build research-backed inclusion models that meet students’ needs — both students with disabilities, and those without disabilities. This requires re(organizing) resources at the school and system levels, taking a “**Do Now, Build Toward**” approach that equitably addresses urgent student needs and sustains these changes even after ESSER funding expires. Leaders can start this urgent work by identifying relevant and doable starting points based on their district’s context, and designing and implementing changes with a bold longer-term vision in mind.

For concrete examples of what a “Do Now, Build Toward” approach can look like for districts and schools working to implement effective inclusion models, see our brief, **Using ESSER Funds to Support Effective Inclusion Models** — or explore our **Do Now, Build Toward Toolkit**.
Case Study School Profiles

Aspire ATSA

Aspire Alexander Twilight Secondary Academy
Collaborating on a shared vision for inclusion

513 students overall (grades 6-12)
16% students with disabilities
90% of whom are in the general education setting more than 80% of the time
See Figure E in the “Methodology: School Selection” section of this paper for breakdown by disability type.

63% students eligible for free and reduced-price lunch
68% Hispanic
5% two or more races
16% white
4% Black / African American
5% AAPI

Special Education Team

CMO Special Education Director
Regional Special Education Director
Special Education Program Specialist
Principal
Assistant Principal
Dean of Students

General Education Teachers
Special Education Teachers
Paraprofessionals

College Academic Counselor
Social-Emotional Counselor

Mental Health Counselor
Psychologist
Other Related Service Providers
Aspire ATSA

Journey to Inclusion

In high school, there is so much content delivery that any potential benefits of pulling students with disabilities out of the classroom do not outweigh the cost.

-Special education teacher

Aspire ATSA has never had substantially separate classrooms, but initially most special education services were pull-out. Over time push-in services prevailed, but one school leader reflected that it still didn’t feel truly inclusive, even though students with disabilities were in the same classroom as their peers. Moreover, one school leader explained that data showed that this model was not working — students with disabilities were underperforming relative to peers, and Black and Lantinx students were overrepresented among students with IEPs — so it was critical to experiment with a new approach.

Determined to realize their organizational mission to serve all students — especially those who are often underserved — ATSA renewed its efforts to build an inclusive community of learners. Other schools in the Aspire network, particularly in the Los Angeles region, had already made significant progress with their inclusion models, so ATSA looked to the regional and central offices for guidance.

We want students to be civically engaged and go on to build an inclusive world, so it’s important to model inclusive practices [at school].

-Regional leader

Spearheaded by the principal and regional special education program specialist, two years ago ATSA explicitly named inclusion as a central component of the school’s vision, and began experimenting with co-teaching. The proportion of students with disabilities in the least restrictive environment has increased, with the only remaining pull-out being for related services such as speech and occupational therapy. A collaborative effort spanning the regional and school staff has been critical to establishing and evolving this shared vision for inclusion.
Aspire ATSA

Strategy Highlight

ATSA is supported by Aspire’s Central Valley Region and the CMO network overall. Quarterly regionwide professional learning days for instructional staff encourage collaboration across school sites in the region, as do the monthly special education huddles led by the regional special education director. In these meetings, area superintendents, principals, and special education program specialists come together to share best practices, streamline decision-making, and identify resource shifts that support inclusion and co-teaching. Guidance is also provided at the regional level around scheduling: an annual professional learning session (accompanied by one-on-one coaching by a scheduling expert) helps principals to design schedules that facilitate inclusion and co-teaching.

The special education program specialist bridges the relationship between the regional office and individual school sites. Working in a peer-to-peer relationship with principals at three schools, the special education program specialist spends their time on site participating in weekly co-teaching committee meetings (alongside school leaders and teachers) to collect data, review observation feedback, determine strengths and gaps, and tailor staff professional learning accordingly. The program specialist and principal have also committed to conducting two observations per month for all general and special education teachers, to ensure continuous improvement of their inclusion model.
Case Study School Profiles

Caliber CMA

Caliber ChangeMakers Academy
Centering social-emotional learning as a foundation for inclusion

757 students overall (grades K-8)

In Middle School...

227 students

15% students with disabilities

71% of whom are in the general education setting more than 80% of the time

See Figure E in the "Methodology: School Selection" section of this paper for breakdown by disability type.

70% students eligible for free and reduced-price lunch

49% Hispanic

8% AAPI

31% Black / African American

3% white

9% two or more races

Special Education Team
Caliber CMA

Journey to Inclusion

According to one school leader, Caliber CMA has always intended to be an inclusive school, but the systems that facilitate inclusion had to evolve over time. The school is relatively young, with the first middle school grade opening in 2017 and maturing into a full 6–8-grade program two years ago. As the school itself grew, so did the inclusion model. Each year, iterations on the previous model have been implemented to reflect learnings from the most effective teacher teams and to further meet the needs of the growing student body. For example, during the 2020-2021 school year, despite the challenges presented by the COVID-19 pandemic, special education staff became departmentalized and spaces for general education and special education teachers to collaborate were formally established.

Caliber CMA continues to realize and strengthen its special education mission: to identify and provide the opportunities and options students should have to live a life full of choice. This is achieved through a strong belief in collective responsibility, where everyone on the campus is seen as an educator and has a duty to support the learning of every single student.
Caliber CMA

Strategy Highlight

Social-emotional learning is a key priority for staff at Caliber CMA. The social-emotional learning program is available to all students and provides a robust foundation for inclusion by ensuring staff are meeting diverse social, emotional, and behavioral needs so that every student can thrive in an inclusive general education setting. As part of its approach, Caliber CMA embraces restorative justice practices and draws upon different curricula to support students’ understanding of social-emotional learning and their own development.

“We have a core mindset that every student deserves an excellent education that provides them with options and opportunities, not only in school but in life. That really drives our academic programming, our social-emotional programming, and it absolutely lies at the core of our special education programming.”

—School leader

Caliber CMA invests in a team of four clinicians, a lead behavioral interventionist, and a director of social-emotional learning, to meet students’ social and emotional needs throughout the K-8 grades. The logic behind the substantial staffing investment is that social-emotional services become available to everyone, so students can receive the support they need without going through a formal process featuring multi-week interventions in order to be connected with a professional.

The clinicians are tagged to specific grades, so that teachers have consistent contact with at least one member of the team who is always on standby to either respond to referrals or join the classroom upon request. The clinicians also work one-on-one with students, providing Tier 1 or Tier 2 supports such as social-emotional interventions, counseling, mental health therapy, and social work support, depending on individual students’ needs. While these services are universal, students with disabilities particularly benefit from the ease of access to these staff members, whether they have services written into their IEPs or not. Students with disabilities who experience severe behavioral challenges receive services from the lead behavioral interventionist, who provides Tier 3 or Tier 4 interventions to a small caseload. Having these service providers on the school staff facilitates collaboration, increases access, and helps cultivate a school culture conducive to inclusion.

“The big difference [at Caliber CMA] is that we have more hands on deck. In other schools, students with disabilities are seen only as students with disabilities — it feels like that for the student, and it feels like that for the staff. The big advantage we have is that it’s not like that at all.”

—Social-emotional learning team member
Case Study School Profiles

CHIME

CHIME Institute’s Schwarzenegger Community
Building pipelines and capacity to strengthen instruction

780 students overall (grades K–8)

In Middle School...

222 students

28% students with disabilities

100% of whom are in the general education setting more than 80% of the time

6% of whom have low incidence disabilities

See Figure E in the “Methodology: School Selection” section of this paper for breakdown by disability type.

18% students eligible for free and reduced-price lunch

65% white

4% AAPI

21% Hispanic

3% Black / African American

5% two or more races

1% Native American
CHIME

Special Education Team

Inclusion is the founding principle of CHIME, written into its namesake — today, the acronym stands for Community Honoring an Inclusive Model of Education. Starting in 1990 as an early intervention program for children under the age of three, CHIME launched a PreK-4 charter in 2001, which by 2010 had evolved into its current PreK-8 program. Throughout this time, CHIME established itself as a leader in inclusive education, particularly among California charter schools.

The school’s website explains, “inclusive education at CHIME Institute means that children who reflect the demographics of the surrounding region — including children who develop typically, children with special needs and children who are gifted — learn side by side.” CHIME’s executive director champions inclusion, defining it as, “all students having an authentic role in the general education classroom, where meaningful work is differentiated to meet their needs.” While this philosophy is deeply rooted in the school’s history, it lives on in the mindsets of school leaders and staff, in part due to CHIME’s intentionally inclusion-focused staff pipeline and professional learning.

Students graduate with a better sense of self and humanity. Socially and emotionally, students become more caring and compassionate humans. All students benefit from one another in an inclusive classroom.

— General education teacher
CHIME

Strategy Highlight

CHIME maintains its culture of inclusion by recruiting teachers from a reliable pipeline and investing heavily in staff development. There is an emphasis on hiring from California State University, Northridge (CSUN); student teachers at CSUN spend time at CHIME learning about inclusion, so candidates from the university understand CHIME’s mission and are familiar with the school’s practices. Meanwhile, CHIME intentionally recruits candidates from external pools who have co-teaching experience, or at least have a proven capacity for and interest in working in an inclusion setting. During the interview process, general education teacher candidates do a demonstration lesson, working with an existing CHIME special education teacher to co-plan and co-teach a class. Whether recruiting from its partnership university or from external pools, CHIME conscientiously assesses the mindsets and skill sets of candidates with respect to inclusion, in order to ensure they are well-suited to the school’s culture and mission.

General education teachers know as much about students on my caseload as I do.

-Special education teacher

Every teacher who is new to CHIME is assigned a mentor for their first two years at the school. Mentors are experienced CHIME teachers who help their junior colleagues adapt to CHIME’s inclusion model. Mentors have professional learning sessions once per trimester to collaborate on observation templates and plan for monthly mentee meetings. While mentor teachers do not receive additional release time, there is sufficient cover available to allow mentors and mentees to observe each other’s classes. Regular observations and feedback meetings allow general education teachers to hone their inclusive pedagogy, while special education teachers refine their management of IEP processes. This investment in new teacher development helps build an inclusion-focused staff.

CHIME also invests in the professional development of its paraprofessionals, simultaneously providing individuals with rewarding career growth opportunities and strengthening the school’s pipelines for other special education positions. Paraprofessionals engage in weekly special education training, organized by the paraprofessional coordinator, and taught by special education teachers or school leaders. Paraprofessionals who excel in the role may be promoted to special education assistant. While not fully credentialed teachers, these special education assistants play a more active role in planning instruction, co-teaching, and facilitating the professional learning of paraprofessionals. At times, CHIME has helped staff acquire their teaching credentials. Thus, CHIME’s strong pipeline of special education talent draws upon not only the partnership university and external pools, but from within CHIME itself.
Case Study School Profiles

Silver Oak

Silver Oak Montessori Public High
Emphasizing differentiation to serve the individual

219 students overall (grades 9-12)
12% students with disabilities
100% of whom are in the general education setting more than 80% of the time
See Figure E in the “Methodology: School Selection” section of this paper for breakdown by disability type.

87% students eligible for free and reduced-price lunch
60% Hispanic
5% AAPI
19% Black / African American
4% two or more races
6% white

Special Education Team

I collaborate more [with the special education director] than I do anyone else. Everything about Silver Oak makes it possible to be individualized: the two-hour class sessions, the multi-age classrooms, the Montessori methodology, the RTI team, and the administration.

- General education teacher
Silver Oak

**Journey to Inclusion**

Silver Oak has been a Montessori school since its founding, and many school leaders and teachers cited Montessori’s individualized approach to education as being highly conducive to serving students with disabilities in an inclusion setting. One school leader commented, “you have to remind yourself who in the room has an IEP — you are differentiating for all students.” Given that the Montessori method is central to inclusion at Silver Oak, the school looks to either hire teachers with Montessori credentials or support them in acquiring it. Further, the Montessori-trained principal focuses on inclusion at the school, seeking to ensure that a positive mindset trickles down to all staff, so that students with disabilities are recognized and taught as individuals.

**Strategy Highlight**

The Montessori approach aims to recognize and accommodate the individual needs of all students, and therefore requires individualized, differentiated teaching. One way teachers at Silver Oak meet individual needs is by offering choices to students. All assignments and assessments incorporate choice — in terms of both format and content — in order to connect with diverse learners and recognize students’ strengths. This is particularly beneficial for students with disabilities, who can demonstrate their understanding and achieve grade-level standards in ways that are aligned with their individual needs and skills. Another feature of the Montessori method, the block schedule, creates time for staff to stage interventions for students with disabilities without interrupting direct instruction. Teachers lead a maximum of twenty minutes of direct instruction per two-hour block, leaving plenty of time for push-in or small group work.

Silver Oak’s individualized instruction and academic support cannot only be attributed to its Montessori model — staff roles and responsibilities are a key component too. First, with regards to individualized instruction, a full-time instructional coach is available to support teachers with their course or lesson planning, including designing study guides that outline the choice offerings described above. The instructional coach also observes teachers once per month, providing feedback and coaching them on their co-teaching practice or differentiated pedagogy. One teacher commented that the instructional coach is “one of [Silver Oak’s] greatest assets.”

Second, several staff positions provide individualized academic support. For example, the Response to Intervention (RTI) team brings together the special education director, principal, assistant principal, and academic counselor for two hours each week to assess progress and plan interventions for individual students. The academic counselor, included on this team, also attends students with disabilities’ IEP meetings, oversees their grade reports, helps with their class scheduling, and provides their college counseling. This academic counselling role is distinct from the mental health counseling role, which in turn is distinct from the psychologist’s assessment role. All three people provide direct support to students with disabilities and communicate with their families — however, all three specialize in different areas, allowing the academic counselor to focus entirely on ensuring adequate individualized academic support for all students.
Appendix A:
Financing the Resource Shifts

Figure X.1: Dollars Per Student, by Staffing Positions Associated with Inclusion

Figure X.2: Non-Instructional Staff, by Dollars Per-Pupil
Appendix A: Financing the Resource Shifts [Continued]

Savings Unrelated to Inclusion: Lower Spending on Teacher Compensation

Despite having comparable numbers of teachers as comparison schools, all four case study schools spend fewer dollars per student on teacher compensation. See Table X.3 below. This is a function of having more novice teachers and lower teacher compensation compared to comparison schools. For example, School D has 29.3 teacher FTE per 500 students, similar to 30.0 teacher FTE per 500 students at a comparison small school — however, School D spends $3,434 per student on teacher compensation in comparison to $5,456 per student. On average, teachers at School D have 8.3 fewer years of experience in the profession than teachers at comparison schools and are compensated approximately $20,000 less than teachers in comparison schools.

Table X.3

<table>
<thead>
<tr>
<th></th>
<th>Comparison School</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
<th>School D</th>
</tr>
</thead>
<tbody>
<tr>
<td>teacher FTE / 500</td>
<td>30.0</td>
<td>31.3</td>
<td>33.8</td>
<td>28.6</td>
<td>29.3</td>
</tr>
<tr>
<td>$ per-pupil spent on teacher compensation</td>
<td>$5,456</td>
<td>$4,852</td>
<td>$4,172</td>
<td>$3,345</td>
<td>$3,434</td>
</tr>
<tr>
<td>average teacher years of experience</td>
<td>13.0</td>
<td>8.9</td>
<td>7.3</td>
<td>3.5</td>
<td>4.7</td>
</tr>
<tr>
<td>average teacher compensation</td>
<td>$91,208*</td>
<td>$83,317</td>
<td>$65,060</td>
<td>$72,609</td>
<td>$71,643</td>
</tr>
</tbody>
</table>

*Note that average teacher compensation, as with all dollar amounts in this paper, has been adjusted for the different districts in our comparison database to account for regional differences.
Appendix A:
Financing the Resource Shifts [Continued]

Savings Unrelated to Inclusion: Lower Spending on Non-Personnel Costs

Case study schools spend less per student on non-personnel costs in certain areas, such as instructional materials and supplies, as well as utilities and facilities maintenance. See Table X.4 below. Since case study charter schools operate outside of traditional districts and therefore adopt some of the costs usually offset by economies of scale, case study schools spend more per student on other operating costs, including school governance and administration, business services, and food services. However, the overall difference in non-personnel costs creates savings for the case study schools.

All four case study schools spend less per student on instructional materials and supplies than comparison schools. The principal of one case study school explained that they save money on curricular materials by partnering with external organizations to obtain high quality materials at a lower cost. All four case study schools spend less per student on facilities maintenance and utilities than comparison schools.

Table X.4

<table>
<thead>
<tr>
<th></th>
<th>Comparison School</th>
<th>School A</th>
<th>School B</th>
<th>School C</th>
<th>School D</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ per-pupil spent on instructional materials and supplies</td>
<td>$934*</td>
<td>$176</td>
<td>$240</td>
<td>$272</td>
<td>$361</td>
</tr>
<tr>
<td>$ per-pupil on facilities maintenance &amp; utilities</td>
<td>$945</td>
<td>$484</td>
<td>$650</td>
<td>$492</td>
<td>$581</td>
</tr>
</tbody>
</table>

*The average spending per student on instructional materials and supplies varied significantly among the comparison schools in our comparison dataset (between $350 per-pupil in one district, and $1,700 per-pupil in another). Nevertheless, case study schools generally spend less than even the lowest-spending comparison district.
Appendix B: 

Additional Context on Special Education and Charter Schools in California

In 1974, the California State Board of Education adopted the California Master Plan for Special Education. This statewide plan to equalize educational opportunities outlined the process of developing a quality educational program for students with disabilities.  

The Master Plan required that all school districts and County Offices of Education (referred to as Local Educational Agencies, or LEAs) join together in geographical regions to develop a regional special education service delivery system. A region might be a group of many small districts or a large single district, but each region must be of sufficient size and scope to provide the full continuum of services for children and youth residing within the region boundaries. The service regions were named Special Education Local Plan Areas (SELPAs).

California allocates funds for special education separately from all other education funds and distributes them to different entities. In California, the Special Education Program, also known as AB 602, provides funding to special education local plan areas (SELPA) based on the SELPA’s average daily attendance and other data elements. The formula allocates varying amounts of per-student funding for each special education local plan area (SELPA), based on varying historical SELPA costs for services.

In California, charter schools are typically authorized by local school districts and managed by either those LEAs or by independent parties. Charter schools are exempt from some state education laws and are meant to innovate on practices found in traditional public schools. Many charter schools, especially single-site operators and smaller networks rely on their authorizing districts to provide certain basic services, such as payroll processing, while multi-site charter management organizations like KIPP Network typically provide these services internally.

Local education agencies are responsible for ensuring students with disabilities receive the services outlined in their IEPs. State and federal law allows charter schools to be part of their authorizing district’s SELPA to help provide special education services. The SELPA and authorizing district for each school included in this case study can be found in the table called “Case Study Schools at a Glance” located in the Methodology section of this paper.

In contrast, charter schools may choose to provide special education services directly and be responsible for their students’ IEPs. In these cases, charter schools receive special education funding and may vote in SELPA decisions. These charter schools may join either a collaborative SELPA (with other school districts) or a charter-only SELPA (with other charter schools). It is most common for charter schools to remain a part of their authorizing districts’ SELPA for special education purposes.

State law requires charter schools to accept all interested students as long as their school sites have available room. Both state and federal law prohibit charter schools from refusing to accept a student based solely on a disability. However, public data suggest charter schools are less likely than traditional public schools to serve students with disabilities. Ten percent of students attending charter-only SELPAs have IEPs, compared to 12 percent of students in regional and single-district SELPAs. Two percent of students attending charter-only SELPAs have low-incidence disabilities (for example, a visual or hearing impairment or a significant cognitive impairment), compared to four percent of students in regional and single-district SELPAs.
Sources and Endnotes

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3 The Center for Learner Equity was formerly known as the National Center for Special Education in Charter Schools.

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8 California Department of Education. *California Special Education Local Plan Areas.* 2021.
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