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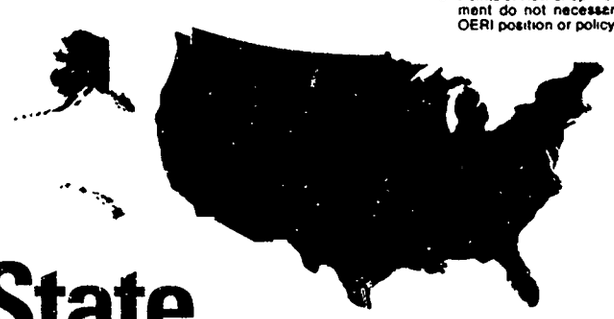
ABSTRACT

This study explored the relationship between costs and benefits of supported (inclusionary) education practices as implemented in 10 schools in 9 Oregon school districts. Specifically, results are presented from a series of interviews conducted with special education directors and principals. Interviews explored administrators' perceptions regarding the resource implications of supported education, focusing on: (1) one-time, start-up costs such as physical modifications to buses and other facilities; and (2) ongoing costs associated with supported education, such as changes in daily costs of transporting students and providing aides and resource teachers in regular classrooms. Increasing staff size was found to be a major component of supported education implementation, as resource teachers and aides spent more time working in regular classrooms and otherwise assisting regular classroom teachers. Transportation costs increased initially to make busing more accessible, but declined in the long term as a result of shorter distances travelled by students being served in neighborhood schools instead of district centers. Costs of adapting buildings for accessibility were considerably lower for newer buildings compared to older buildings. Additional staff development was the most significant need expressed by all districts. (PB)



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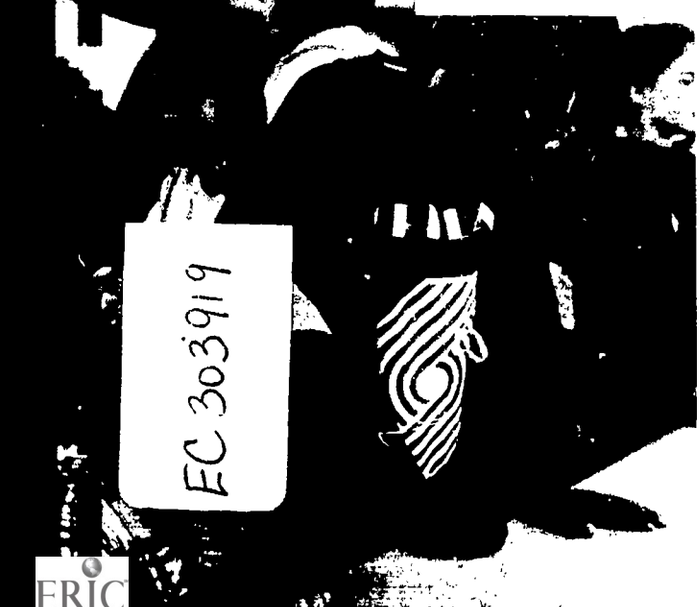

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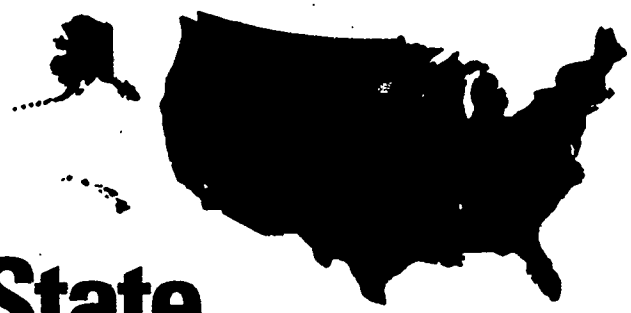

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The Center for Special Education Finance (CSEF) was established in October 1992 to address a comprehensive set of fiscal issues related to the delivery and support of special education services to children throughout the U.S. The Center's mission is to provide information needed by policymakers to make informed decisions regarding the provision of services to children with disabilities, and to provide opportunities for information sharing regarding critical fiscal policy issues.

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I. Overview

During the last 5 years, the State of Oregon has made changes in the special education funding system which were, in part, directed at reducing the incentives for separate placements for children with disabilities. In addition, the Oregon Department of Education (ODE) has sponsored training programs for local teachers and administrators designed to promote what they call "supported," or inclusionary, education practices. Supported education involves the restructuring of schools and classrooms to move students with disabilities into less restrictive environments, including regular classrooms in their neighborhood schools.

At the same time that the Oregon Department of Education is encouraging supported education through these training programs, it also is collaborating with Dr. Joel Arick of Portland State University (PSU) to conduct a study of the outcomes of supported education. During the initial phases of this outcomes study, the focus was on the perceptions of teachers and parents of supported education. A purposive sample of schools that had participated in the ODE-sponsored training programs was selected, and survey instruments were administered to regular educators, special education teachers and support staff, and parents. Subsequent work in some of these same schools began during the 1993-94 school year in order to gather additional data on student outcomes to examine patterns as they relate to supported education practices.

In 1993, the Center for Special Education Finance (CSEF) joined in a collaborative agreement with the ODE and Joel Arick at PSU to bring their expertise to a study related to the costs of supported education. The purpose of this study is to explore the relationship between the costs and benefits of moving toward a model of supported education. This study focuses on 10 schools located in 9 school districts in Oregon. This paper reports on only one aspect of the data

collection activities undertaken for this study by CSEF staff. It addresses the following question:

> *How have schools in the Oregon sample changed their patterns of resource allocation in response to implementation of "full-inclusion" or "supported" education?*

Specifically, this paper presents results of a series of interviews conducted with special education directors and principals in the sample districts and schools. The interviews gathered information about the perceptions of these administrators regarding the resource implications of supported education as it has been implemented in their districts and schools. In particular, the interviews explored the perspectives of administrators regarding the costs of implementing supported education, including (a) one-time, start-up costs, such as buying buses to meet the needs of orthopedically impaired students or modifying facilities to make them accessible to disabled individuals; and (b) ongoing costs associated with supported education such as changes in the daily cost of transporting students from home to school or the costs of aides or resource teachers providing special services in regular classrooms.

Subsequent reports will focus on more quantitative data regarding the costs of supported education models. Ultimately, these analyses, combined with the information on outcomes and benefits being gathered by Joel Arick, will provide a basis for exploring cost-benefit issues related to supported education in the sample of Oregon schools.

II. Method

The schools in this study are a subset of those being studied by Dr. Arick at PSU. Cost data were collected from 10 schools and 9 districts, with the largest district in the sample having 2 schools represented. Three of the 10 schools are high schools; the other 7 are elementary schools.

CSEF staff collected both quantitative and qualitative data, using three main types of instruments: resource allocation forms (used to collect budget and enrollment data), questionnaires (used to collect data on teachers, aides, and students), and interview protocols (used in interviews with school principals and district directors of special education programs). The samples of regular education teachers and students were selected randomly, using 15 and 20 percent samples, respectively. Information was gathered from all special education teachers and aides at the sampled schools.

CSEF staff are currently in the process of analyzing the quantitative data from these sites. The findings included in this report focus on the information collected through the interviews. These findings, presented in the next section, provide initial impressions on how efforts to implement supported education are affecting patterns of resource allocation and costs in Oregon schools.

III. Findings

Special Education Identification Rates

The special education identification rate (i.e., the percentage of total enrollment eligible for special education services in the district) ranged from a low of 7.9 percent to a high of 14.7 percent across the nine sample districts. Currently Oregon places a cap on the number of students in any given district for whom it will provide funding at 11 percent of total enrollment. In fact, four out of the nine districts in the sample had special education identification rates that exceeded the funding cap, meaning that these districts have identified a greater percentage of their students for special education than will be eligible for state special education funding. At the other end of the spectrum, districts with low special education identification rates receive less funding overall, leading one district whose program stresses "appropriate" identification (it has an 8.2 percent identification rate) to feel penalized by "losing $250,000 in state revenues" because of underidentification in relation to the 11 percent state funding cap.

Supported Education Policy Statements

A majority of the sample districts (six out of nine) have written policy statements affirming their commitment to supported education. For example, one district's Special Education Vision Statement states: "Students benefit from being educated together." At least one district put such a statement in place only recently, in the 1993-94 school year; however, at least one district has had such a policy since 1990. Most of the other districts stated that such a policy is inherent in their overall mission statements, that they have an "understood" (though not written) policy, or that they have a Special Education Vision Statement that affirms such a policy.

Moving Students into Neighborhood Schools

In general, the sample districts did seem to be moving students into their neighborhood schools. For example, the number of students *not* in neighborhood schools decreased from 32 to 11 in one district, due to its policy of supported education over the last 3 years. Currently, 95 percent of special education students attend their neighborhood schools in this district. During this period, another district went from 80 percent of students in their neighborhood schools to 97 percent. The first of the sampled districts to begin implementing supported education a few years ago has nearly 100 percent of its students attending their neighborhood schools. In addition, results from our *Student Information Forms*[1] for all districts indicated that 77 percent of special education students attended their neighborhood schools, while 23 percent were not attending their neighborhood school.

Moving Students into Regular Education Classrooms

Most districts seem to have more special education students in regular classrooms than previously, and some schools no longer have self-contained classrooms. Staff from 7 of the 10 schools reported that by the 1993-94 school year, at least 90 percent of special education students were being served in regular classrooms. Actually, 4 of the 7 schools reported all special education students were served in the regular classroom. One district, for example, had only 50 percent of special education students in regular classrooms in the 1991-92 school year, but now has nearly 100 percent in regular classrooms. Many of the students who currently remain in self-contained classrooms do so because their behavior is likely to be disruptive or dangerous to other students; others are not believed to be able to obtain appropriate instruction in a regular classroom. Although in many cases parents have been strong advocates for inclusion, some students remain in self-contained settings because of their parents' preferences.

[1]Special education teachers at the sampled schools were asked to complete a questionnaire, *the Student Information Form*, for a maximum of four students from their caseload. The results are based on the 72 *Student Information Forms* received. One of these forms did not indicate whether the school that the special education student was attending was in their home attendance area.

Effects on Costs

According to the interviews conducted with district directors of special education and school principals, costs in some districts may have gone up in the short term with the inclusion of special education students in regular classrooms. However, this may be a temporary phenomenon, at least if the current level of services is maintained. Specifically, many of the increases seem to have been the result of fixed or one-time expenditures (e.g., buying buses with wheelchair lifts, cutting ramps into curbs). Costs affected by inclusion can be grouped into five categories: personnel, transportation, facilities, materials and equipment, and professional development. Findings for each category are summarized below.

■ Personnel

In general, the sample districts reported that they were shifting the allocation of personnel in ways that may not have a great effect on overall costs. Some increase in teacher workloads may occur, but in most cases, the type of work teachers do appears to be shifting rather than increasing. For example, while in two districts special education teachers are serving more students (i.e., they have larger caseloads), in a majority of districts, they are spending more of their time working and consulting with regular classroom teachers. Some of this support involves the adaptation of curricula. In at least four of the districts, special education teachers are team-teaching with regular, bilingual, or Title I (formerly Chapter 1) teachers. The majority of the sample districts now have special education teachers doing almost no "pull-out" or resource room activities and have few or no self-contained special education classrooms. This, it should be kept in mind, is despite the fact that in recent years, some of the districts have seen higher numbers of students with more serious disabilities (e.g., higher proportions of mentally retarded students as compared to students classified as learning disabled). A majority of the sample districts reported that they are using more aides in classrooms as a result of inclusion. Some of these aides are "cross-trained" to work with regular education students as well as special education students.

■ Transportation

Two districts reported no overall change in transportation costs. Special education directors in three districts were not able to determine whether any change in transportation costs had occurred over the last 3 years. One district found the cost of transportation to decrease, and three experienced an increase.

In at least one case, though, the increase was reportedly a result of transporting emotionally disturbed and developmentally delayed students out of the district so that they could have trained instructors to work with them. One of the districts reporting a decrease in transportation costs noted that since 80 percent of children are now attending their home schools, the costs of transportation have definitely decreased. In another district, both the cost of bus transportation and the number of children bused decreased over a 3-year period (the cost decreasing by about $25,000, and the number of students by about 100).

Several schools have spent some of their funds to upgrade buses to serve orthopedically impaired students. The need for accessible buses may have gone up as students are increasingly bused to local schools, rather than consolidated in buses going to special designated schools. However, two things should be kept in mind regarding this trend. First, allowing special education students to attend neighborhood schools may have the effect of lowering district transportation costs for some students, since many can access the regular transportation system. More importantly, the conversion and purchase of buses for shorter bus routes to neighborhood schools is a fixed, one-time cost, while the maintenance of longer routes to special schools incurs continuous, ongoing costs. Thus, as a result of inclusion, one might expect initial increases in transportation costs to pay for improving the accessibility of buses, but lower transportation costs over time with special education students being transported shorter distances.

■ Facilities

All districts have had to expend funds to make schools more accessible. The amount spent in recent years and the extent to which facilities are still not fully accessible vary quite a bit by district, however. Some districts had most of their schools accessible by 1991 because the schools were originally designed to be accessible or were easy to modify. Other districts, especially those with old, multistory buildings, have faced extensive modifications. For example, in one district, all schools but one have been accessible since 1991; and the district has had to spend only a minimal amount to alter curbs and restrooms. Another district is trying to pass a bond issue to make its remaining three schools accessible and has engaged in innovative attempts to raise awareness. Other districts, with none of their schools fully accessible in 1991, have generally taken an incremental approach. One of the larger sample districts has a prioritized access plan estimated to cost $700,000, including the cost of improving transportation accessibility; but even smaller districts have sometimes had to make large outlays. For example, one district had an elevator installed at a cost

of about $130,000. Improvements have included installing showers for students who need to be bathed, remodeling rooms to provide quiet spaces, as well as more common changes like installing ramps and modifying bathrooms.

Materials and equipment

There seems to be a great deal of variation in the extent to which schools have expended funds on materials and equipment to facilitate inclusion. This may not be so much a function of differential need, but of the extent to which administrators have funds available for such purposes. For example, one district has not increased expenditures on materials and equipment over the last 3 years in spite of a tremendous increase in need; available funds had to be used just to keep adequate numbers of teachers and aides in the classrooms. This is not surprising in the climate of serious fiscal crisis that characterizes public school finance in Oregon. Some districts have been able to buy or borrow equipment from regional programs to facilitate mobility or communication for vision and hearing impaired students.

Professional development

The summer training institutes sponsored by the Oregon Department of Education have provided training needed by many of the districts, including training for regular and special education teachers, administrators, parents, and community members. These institutes were in most cases the original impetus for supported education. Districts located near the University of Oregon and Portland State University have been able to send teachers there to upgrade their skills by taking classes. Some districts have paid for substitutes to provide teachers with release time to train in supported education methods (for example, by observing strong inclusionary classrooms and by seeing students who will be transitioned into their classroom). Other districts have provided teachers with additional planning or consulting time to prepare for particular students. One district spent between $12,000 and $15,000 to train staff in inclusion; another district's costs for inclusionary staff development have been increasing at the rate of $1,000 a year. Increased staff development is the most often cited need of districts that are implementing inclusion. However, dwindling resources, a result of the voter-approved property tax known as Measure 5, appear to have diminished districts' ability to facilitate training, as resources must be used merely to maintain minimal staffing levels.

Perceptions of District Directors of Special Education: *What Else Is Needed?*

District directors of special education were asked what they would do if they had additional funding. Every director in the sample cited the need for additional staff development, and many mentioned the need to recruit teachers trained in supported education. Training needs include the following:

- training principals in inclusion
- training both special education and regular classroom teachers to modify lessons for students with an Individualized Education Program (IEP)
- training special education teachers to act as consultants
- training more teachers to work with students with more severe disabilities, as well as general training in special education and inclusion practices

Training could be accomplished through a combination of in-service, modeling, and visits to programs that are particularly effective in general, or that are working well with students with specific, lower-incidence disabilities (what one director called "cross-pollination"). Some expressed a need for teachers to develop better team-teaching skills. Planning to facilitate students' transitions from elementary to middle school and from middle school to high school is also of concern.

Several administrators wanted to be able to hire substitutes to free regular teachers for occasional staff development activities. Increasing the inclusion skill levels of all teachers would also help avoid the problem of burning-out effective teachers through "stacking" (i.e., the practice of placing the special education students who need the most help in a particular teacher's class year after year because the teacher is thought to be the best at handling difficult students). An ideal staff development, one director argued, would lead to dual certification: teachers would be both trained and certified for special and regular education. Adequate staff development is not only necessary to ensure high quality education experiences for special and regular education students; several

administrators felt it is essential in getting reluctant staff members to buy into supported education.

Mentioned almost as often as staff development was reducing class sizes, hiring more teachers, and replacing those who fight against inclusion. Smaller classes would allow teachers to give more attention to each student and would reduce the burdens associated with including children with greater special needs. A couple of administrators remarked that the effect of recent reductions in force, from which teachers with more seniority were protected, was that the schools lost many innovative teachers and were left with a higher proportion of older teachers who are resistant to inclusion. Teachers resistant to inclusion include both regular and special education teachers. One director suggested that by moving staff around within a district, it might be possible to create better teams. Some of the best special education teachers would be moved to schools whose programs are less effective, in order to act as mentors. Most directors also thought that increasing the numbers of aides and other types of personnel support such as speech therapists would be valuable for the same reason.

Additional staff time is also needed for teachers to collaborate in planning. One director felt that the district office needs more staff, including field supervisors, to work with the education assistants at each school to help them build teaching skills. Another mentioned a need for better determining how effectively aides are being used in order to improve their skills and their effect on student outcomes. Other districts as well mentioned the need for additional district level staff, for example, to act as consultants in the schools.

One director cited the need for additional counselors and child development specialists. Another mentioned the valuable role a social worker at each site could play in helping families to reinforce the gains of their students. One of the directors who brought up the need to get additional help from other agencies noted that one special education teacher with a caseload of 40 students had more than 10 of his students move this year; some of the students are homeless, some living in campgrounds until they are forced to move. Having nursing staff on site during school hours was also considered important because of the presence of students who have seizures, need to be catheterized, or require other medical assistance. Others mentioned the importance of having staff who possess knowledge about, and experience working with, more severely disabled students.

Another change recommended by one of the directors was that the regional services, which are state funded in Oregon, and the educational service districts, which are county funded, should be combined in order to streamline administration, equalize service in poorer rural areas, and increase accessibility of services. In general, more movement toward integration between special programs, such as special education and Title I, and between special programs and regular classroom teachers is needed.

Another issue raised was that, because of the differences in funding and in how a district determines eligibility for special education, problems of equity arise: the same student would be eligible to receive help in one district but not in another. Moreover, the type of services received might differ as well. However, this problem extends beyond those related to the implementation of inclusion.

Administrators also reported that facilities, in many cases, need to be made more accessible. One director mentioned the need to add carpeting to reduce the ambient noise that disturbs and distracts children, especially those who are hearing impaired. Placing a telephone in each classroom would facilitate teachers' communications with special education staff and parents and would be very valuable in case of emergencies.

Several districts indicated that more special equipment should be purchased, especially computers. Particularly helpful would be having a lap-top assigned to each child. For some students, computers are a primary, or the only, means of communication; and, although many schools have the basic equipment needed for specific disabilities, many are not able to take advantage of new technological breakthroughs. A few districts indicated a need to computerize documentation of the special education program to facilitate follow-up and reduce paper work. Some districts also noted that most schools lack the types of playground and swimming facilities that would afford special education students a more effective and inclusive physical education program.

IV. Summary

The purpose of this paper has been to summarize the results of interviews with special education directors and principals among the sample of Oregon schools included in the CSEF study of the costs of inclusion. Among this purposive sample of 9 schools across 10 districts, CSEF staff observed considerable variability of special education identification rates (from 7.9 to 14.7 percent), and a trend toward serving a greater percentage of children in neighborhood schools and in regular classrooms. Consistent with the findings by McLaughlin and Warren (1994),[2] this study suggests less of a trend toward increasing staff size as much as toward utilizing staff in different ways. Special education resource teachers spent more time working in regular classrooms and in assisting regular classroom teachers meet the needs of special education students. There was also a trend toward increasing the use of aide time in regular classrooms in which more special education students are being served. In some instances, transportation costs increased initially in order to make buses more accessible, but in the long term transportation costs may decline, reflecting the shorter distances over which students attending neighborhood schools would travel. Districts with older buildings found it necessary to budget for improving accessibility. Districts with newer school buildings, however, did not face such high start up costs.

Additional staff development was the most significant need mentioned by all districts. District directors expressed the need for staff in both regular and special education programs to be trained to work in teaming arrangements, to increase the amount of time for collaborative planning among staff, and to enhance staff knowledge about how to work with severely disabled children.

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[2]McLaughlin, M. J. & Warren S. H. (1994). *Resource implications of inclusion: Impressions of special education administrators at selected sites.* (Policy Paper No. 1). Palo Alto, CA: Center for Special Education Finance, American Institutes for Research.