Guidance Manuals for Educators of English Learners with Disabilities: Ideas and Lessons from the Field

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Guidance Manuals for Educators of English Learners with Disabilities: Ideas and Lessons from the Field

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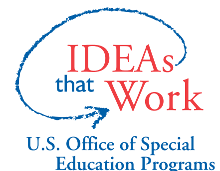

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Executive Summary

Researchers, policymakers and educators are increasingly focused on the accurate identification, assessment, and referral of English learners (ELs) with disabilities, stemming in part from both the under- and over-identification of ELs for special education services, as compared to non-ELs identified for these services. Appropriate decision making is important because ELs with disabilities who are not identified will miss out on services that they need. Conversely, ELs who are misidentified as having a disability receive special education services that they do not require, which may reduce time available for EL services and participation in the general classroom, potentially reducing access to rigorous academic content, and result in social stigma (Umansky, Thompson, & Díaz, 2017; Sullivan, 2011; Garcia & Tyler, 2010; Bianco, 2005; Higgins, Raskind, Goldberg & Herman, 2002).

To ensure that students are receiving optimal instruction and appropriate interventions and assessments, state, district, and school leaders will need to develop or improve the systemic processes educators and administrators work through. Providing manuals with consistent and practical guidance (and professional learning on their use) is one means to do so. The purpose of this report is to describe ideas and lessons learned from leaders in four states (Connecticut, Michigan, Minnesota, and Virginia), a statewide association (Special Education Local Plan Area [SELPA] Administrators of California Association), and a school district (San Diego Unified School District [SDUSD]), all of which have developed manuals. It is hoped that these ideas and lessons will assist leaders who are creating or are in the process of revising procedures and policies of their own.

This report presents findings from telephone interviews conducted with the authors of six manuals from December 2017 to January 2018, probing the impetus for getting started; the manual development process; dissemination and professional learning; and lessons learned during manual development. Findings from the interviews suggest many lessons learned. For example, while there are significant barriers related to system-wide improvements (such as lack of interpreters, staff capacity to conduct trainings, turnover, the time it takes to find new ways of working, and inequitable opportunity for implementation), there also were successes in this area, including more informed practice (e.g., awareness of extrinsic factors and new collaborations among educators) and policy or organizational changes.

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Overview

Researchers, policymakers, and educators are increasingly focused on the accurate identification, assessment, and referral of English learner (EL) students with disabilities, stemming in part from both the under- and over-identification of ELs for special education services, as compared to non-ELs identified for these services. Recent research has shown variable patterns across different locales, disability categories, and grade levels (Umansky, Thompson, & Diaz, 2017). According to Umansky and her colleagues, there are several likely reasons for these differences in findings, including variation in special education identification patterns. For example, educators may struggle with differentiating between language acquisition processes and learning or language disabilities. Factors related to telling the difference include whether the EL student is: receiving instruction of sufficient quality to make expected levels of academic progress; progressing in listening, speaking, reading, and writing English compared with the expected rate for true peers (students with similar age, grade, English language proficiency, culture, and experiential background); and impacted by extrinsic factors (Burr, Haas & Ferriere, 2015). Examples of extrinsic factors include: (a) physical and psychological factors such as health and wellness, self-esteem, and life experiences; (b) personal and cultural factors such as mobility, cultural interactions, and family circumstances; (c) language development factors such as proficiency, contexts of use, and instructional strategies; and (e) previous and current learning environment factors including educational history, opportunity to learn, and gaps in instruction (Gaviria & Tipton, 2012).

To ensure that students are receiving optimal instruction, appropriate interventions, and assessments, state, district, and school leaders will need to develop or improve the systematic processes educators and administrators work through. Providing manuals with consistent and practical guidance (and appropriate professional learning on their use) is a means to do so. To date, nine states (Arkansas, Connecticut, Illinois, Michigan, Minnesota, Oklahoma, Oregon, Vermont, and Virginia) have followed the U.S. Department of Education, Office of Elementary and Secondary Education (2016) recommendations that they should create extensive, research-based guidance to localities for ELs with disabilities. Two more states, Arizona and California, have manuals in development.

Just as critical for accurate identification of ELs with disabilities are comprehensive assessment and evaluation by a multidisciplinary team and using multiple data sources (standardized tests, informal measures, observations, student self-reports, parent reports, and progress monitoring data from Response-to-Intervention [RtI] approaches) (Burr et al., 2015). Four of the six manuals reviewed for this report (Michigan Department of Education, Minnesota Department of Education, SELPA Administrators of California Organization, and SDUSD) describe specific procedures for assessing and evaluating ELs with disabilities. These procedures not only are

important for accurate identification, but also have implications for including these students in large-scale assessment and accountability systems (Thurlow, Liu, Ward, & Christensen, 2013).

This report describes ideas and lessons learned from leaders who developed manuals. The purpose is to assist other leaders who are creating, or are in the process of revising, policies and procedures of their own. The report concludes with implications for state and local leaders.

Interview Procedures and Participants

After conducting web searches to identify those states and localities that offered comprehensive guidance on identifying and evaluating ELs with disabilities, I reached out via phone and email to the authors of the manuals. Authors of six manuals responded, and I scheduled a 90-minute semi-structured interview with them between December 2017 and January 2018. The participants included:

1. Jarice Butterfield, formerly Liaison to the SELPA Administrators of California Organization and Santa Barbara County Special Education Local Plan Area (SELPA) Director (see Butterfield, Lopez, & Gonzalez, 2017)

2. Angela Gaviria, Bilingual Education Specialist, and Timothy Tipton, Transdisciplinary Speech-Language Pathologist and Bilingual Support Network Coordinator, San Diego (CA) Unified School District (see Gaviria & Tipton, 2012)

3. Marie Salazar Glowski, formerly English as a Second Language (ESL)/Bilingual Education Consultant, Connecticut Department of Education and member, Connecticut Administrators of Programs for English Language Learning (CAPELL) (see Connecticut Administrators of Programs for English Language Learners [CAPELL] and the Connecticut State Department of Education, 2011)

4. Judy Radford, formerly ESL Professional Development Coordinator, Virginia Department of Education (see Virginia Department of Education, 2015)

5. Shereen Tabrizi, formerly State EL Director/Manager of Special Populations, Michigan Department of Education, and Jayne Sowers, Senior Technical Assistance Consultant, Great Lakes Comprehensive Center, American Institutes for Research (see Michigan Department of Education, 2017)

6. Elizabeth Watkins, Special Education Diversity Consultant, Minnesota Department of Education (see Minnesota Department of Education, 2019)

During the interviews, I asked open-ended questions in the following areas:

- Impetus for development
- Development process
- Dissemination and professional learning
- Use and impact

The interview protocol is provided in Appendix A.

I recorded and transcribed the interviews. For the analysis, I manually coded my direct notes and the transcripts. I also highlighted portions of the manuals themselves for inclusion in the report, when they added specificity to a point the authors were making. Because this research is open ended, as opposed to theory-driven, I used a data-driven approach to coding. I began with pre-set codes, corresponding to the specific interview questions in these areas. Because of the semi-structured nature of the interviews, I added codes as emergent themes came to light. I coded for both repeated themes and new ideas. After revising the codes, I created categories; these became the topic headings in this report.

Results

Results are organized into four sections: getting started, the manual development process, dissemination and professional learning, and lessons learned related to the manual's use and impact.

Getting Started

Across most states and districts, the main driver of the development of a guidance manual was the over- or-under-representation of ELs identified as students with disabilities. But there were other drivers, too, such as a growing awareness of inconsistent practices at the district or school level, and direct requests for guidance from teachers. Therefore, key to getting started was having an awareness of research and local data as well as meeting the needs of practitioners.

Addressing concerns about the over- and under-representation of ELs identified for special education and related services

Manual authors were aware of the issue of over- and under-representation from national research and from an examination of their own local data. They then were motivated to address it through the development of a manual.

In San Diego, authors Angela Gaviria and Timothy Tipton, were spurred to action in response to two separate but related studies. The first review of special education in 2007 found that the district identified ELs and African American students as having disabilities more often than would be expected. A follow-up study in 2009 examined cultural and linguistic factors in SDUSD and identified patterns of earlier identification, placement in more restrictive settings, limited primary language assessments, and few references to extrinsic factors. The district set about to implement a series of coordinated reforms within general education and special education to improve the quality of special education referral and identification practices for culturally and linguistically diverse students. As part of this, Gaviria and Tipton led the development of a guide that contains all relevant Comprehensive Evaluation Process for English Learners (CEP-EL) documents, with additional supporting documents, that personnel may reference and duplicate. Tipton emphasized that while disproportionality was a driver, there was more to it: "The way to appropriately identify [students] is to take a whole child view of the students and [look at] best practices such as early intervention, extrinsic factors, primary language assessments. These were priorities as well."

In Michigan, Shereen Tabrizi and Jayne Sowers confirmed that the over- and under-representation of ELs identified as students with disabilities was driver number one. They explained that educators in some districts and schools were unclear how to coordinate their services for ELs with potential disabilities in order to differentiate between typical second language acquisition and a possible disability. Further, the authors were mindful that under the federal Every Student Succeeds Act (ESSA), local educational agencies (LEAs) are required to include ELs with disabilities in state English language proficiency (ELP) assessments and report on their progress. Specifically, under Title I of ESSA, states are required to report on English language proficiency progress of ELs and ELs with disabilities. In addition, local educational agencies are required to report on the number and percentage of students making progress towards English language proficiency, and the number and percentage of former ELs meeting State academic standards for four years after exit.

Promoting more consistent use of research-based practices and clarifying misconceptions

From meetings and their own visits to schools, manual authors learned that practice varied widely in schools and districts. They concluded that more consistent guidance was needed to increase the use of research-based and evidence-based best practices for educating ELs with disabilities.

Because districts and school sites vary in terms of whether and how accurately they evaluate and assess students who may have disabilities, Gaviria and Tipton in San Diego explicitly set out to develop research-based evaluation and assessment tools and guidance on how to use them. If an educator used the guidance and moved to another school, then he or she would still

be able to follow the same process and have the same understanding of how to fully understand a student and collect the same information. The authors stressed that the process is more than just forms in a manual; context matters. Tipton explained that the manual provides information on why each form exists, the sequence to follow and strategies for using them, and the person or persons who may be responsible for each piece. Gaviria was clear that she did not want to share the work she and Tipton had developed until it was collected in a manual, because she was concerned that a teacher would just take a form without knowing what to do with it. Her hope was for educators to understand the background that went into the development of each of the tools: "That's how the manual came about—really making sure the tools had a context and that people would utilize them in an appropriate fashion." Tipton added, "There's a lot of good practice out there, but what [we added] is a process for actually using those practices."

In Michigan, Tabrizi and Sowers set out to provide guidance on practice procedures, along with a professional learning plan with training modules for both EL teachers and special educators to collaborate on, and to establish a consistent referral process for accurate identification and appropriate support. As an example of why clear, consistent, written guidance is needed to prevent misconceptions and spread awareness, Tabrizi described visiting districts and being shocked to find that some had written documentation stating that personnel must wait up to three years before referring ELs for an IEP evaluation. Further, many districts were unaware of Child Find, a legal requirement that schools identify and evaluate any child that they know or suspect may have a disability and would therefore be entitled to special education services.

Elizabeth Watkins, in Minnesota, explained that the state has continued to update its original guidance manual since the late 1980s, when it was first developed in response to an influx of refugee families from Southeast Asia, many of whom had not had formal schooling and were not literate in their native language. At the time, the state did not license EL teachers and there were few trained ESL or bilingual education teachers working in public schools. Some school districts looked to special education staff for expertise in teaching students new to U.S. schools. The state agency and districts with large refugee communities were thus motivated to develop guidelines because of concerns about inappropriate identification of ELs for special education services. Watkins described how the pendulum then swung in the opposite direction, leading to a reluctance to refer students for special education evaluations. There were misconceptions about a mandatory three-year waiting period before referring ELs for special education services. While the arrival of successive groups of ELs from different backgrounds, such as East Africans and Karen refugees from Myanmar, has continued to shape referral and evaluation practices, the ongoing goal has been to provide consistent and clear guidance for educators.

Jarice Butterfield, speaking about the SELPA Administrators of California Association's resource book, described confusion in the field, especially around the reclassification process for ELs with disabilities from EL status and the development of linguistically appropriate goals

for IEPs. Therefore, her intent was not just to provide information and resources regarding best practices, but also to clarify regulatory requirements for identifying, assessing, and reclassifying ELs with disabilities.

In Virginia, Judy Radford explained that the impetus was to make sure that educators across the disciplines had consistent processes and procedures in place. Another goal was to strengthen the state's overall language instructional program.

Responding to requests from teachers for guidance

In several cases, the impetus for the manual went beyond research findings related to best practices and consistent guidance to respond to specific requests from practitioners themselves. As Marie Glowski in Connecticut put it, EL practitioners stated:

> We've been saying for a long time that often, at the district level, we find out that ELs are being misidentified, and we really should create a guidance document that may help to address this circumstance.

Glowski also added that the rationale for the manual was not compliance driven. In other words, while districts can be flagged for over-representation of student subgroups in special education, the point was not to keep them out of trouble. She emphasized, "That's not why we developed [the manual]. It was really to support teachers and families, as they're making these decisions."

In Michigan, Tabrizi had received numerous requests from LEAs asking, "'How do we differentiate between behaviors associated with learning a second language and those related to learning or speech and language disability?' So, it came from the field as well as from the research that we knew." Having identified the impetus and need for guidance, these leaders set about an effective way to deliver it.

Manual Development Process

There was consensus among manual authors that several things were critical for those writing or revising guidance. These included securing administrator buy-in; taking time to develop the manual and being sure to include stakeholder input; keeping the manual brief for user-friendliness, including checklists and sample forms; and piloting the manual to seek feedback before dissemination.

Securing administrator buy-in

Manual authors emphasized that the buy-in from district and school-site administrators cannot be underestimated. As Tipton noted:

> It has to be one of our biggest lessons learned: having those advocates at the high levels of your district that care about this. There are so many things that they are asked to do: initiatives, support, etc. There wouldn't be as many people looking at this right now if we didn't have the administrators who bought into this.

Gaviria added, if the school-site administrator believes in the philosophy and the content in the manual, then the staff will be much more likely to commit to it: "You really need [administrator] support in order for the process to work."

Taking time to develop the manual and being sure to include stakeholder input

There was consensus across states and districts that a thoughtful process is crucial, and that it must involve stakeholders and expert reviewers. It can take at least a year for a manual to be completed.

Butterfield shared that the development of the manual took on a life of its own, becoming a second job (which continues for her with trainings). In her case, the SELPA directors, representing every district in the state of California, met monthly for over a year. At these meetings, a committee would work through a chapter, then the directors would take it back to their districts for feedback.

In Minnesota, earlier versions of the guidance were written by practitioners in the field because school personnel in large districts were at the forefront of creating procedures and materials. Some assistance was provided by researchers, but there were relatively few experts at that time. In the 2005 edition, Watkins updated or rewrote sections based on emerging research with assistance from experts who contributed chapters on specific topics. She explained, "I made that change partly because there were many more experts available to [contribute] and time-wise, it's time consuming and hard for practitioners to get away from the classroom to be involved in writing projects." The latest version was updated in collaboration with researchers at the National Center on Educational Outcomes at the University of Minnesota. The initial draft was reviewed by national and state experts. Additionally, the manual was piloted in two school districts where groups of educators were asked to give feedback on what makes sense, what works and does not work, and how to plan for implementation.

In Michigan, Sowers explained the time-intensive process:

> I could do the research, but…[Tabrizi, at the Michigan Department of Education] needed to do [other parts] as the state person. And so this is on top of what she already was doing in her job. Group writing can also be very difficult to put together. It's not easy. It was really a process where we had feedback all along throughout the year and a half… of review, input, feedback, and modification.

In Virginia, it took two years for Radford and her coauthor Marie Ireland, Speech-Language Impairment Specialist, Virginia Department of Education, to develop the manual—not just to update an earlier draft and write new material, but also to make sure that the contents still were up-to-date and in compliance with Title III laws as well as IDEA. Once the draft was solid, they sent it out for review within the agency. This process took six months of back and forth communication.

The development of guidance in San Diego was led by Gaviria and Tipton, in collaboration with other specialists and a school administrator. They were dedicated to involving a broad array of stakeholders, and conducted focus groups with principals, school psychologists, speech-language pathologists, EL support teachers, and cluster support teachers. Participants made recommendations for improving the function and clarity of the documents to facilitate implementation, and provided insights on topics for professional learning as well as which specific groups might benefit from such trainings. Based on the focus group feedback, significant changes were made to the documents and professional learning designs. Gaviria explained, "The only reason it came out as it did is, not just talking about this as a transdisciplinary process, but the development was transdisciplinary as well."

Keeping it brief for user-friendliness

Several states shared that having a concise manual was critical for it to be used. Manual authors shared ways that they started out with brevity in mind, or shortened the manual in subsequent revisions. For example, Glowski in Connecticut emphasized that:

> If [the manual] is not user-friendly, no one is going to use it. There's no point in developing it. People can research on their own…looking on the Internet to get ideas and tips. We were really committed to keeping it as short as possible; even in the appendices, we were not including [information] unless it was something that we actually thought people would use. We were so committed that when we were actually working within the [writing] committee…we were very mindful…. And once something was completed we would look at it again with the lens of, "Can we make this clearer? Can we make it shorter? Is this really necessary to put in, or not?"

She went on to say that the writing team considered including information on the bilingual statute to increase awareness. In the end, after much discussion, the committee decided to leave it out in order to keep the manual as concise as possible.

In Virginia, Radford stressed the importance of 'less is more' so that the manual does not sit on a shelf: "If you give people what they want, in a format they can access, and they can use it the next day, then you've created something that's worthy."

In Minnesota, Watkins explained that the latest revised manual is much more succinct, based on feedback:

> Our agency and the special education division went through a phase where we created large and comprehensive manuals. [The previous manual was 323 pages.] But as technology began to change, we started realizing that we need to be using other modes or methods of disseminating information. We heard from [educators] that they don't have time to read a lengthy chapter…. They need things that are brief, to be able to pull out the relevant information.

Now, for example, there are webinars available on the Minnesota Department of Education website that complement the manual, such as information on the basics of language acquisition and what effective instruction for English learners looks like. Additionally, chapters in the latest version of the manual are posted separately. That way, educators quickly can access the information most relevant to them. For example, as Watkins explained, an EL teacher could skip the chapters on language acquisition and the characteristics of ELs and go directly to the chapters on collecting background information and Multi-Tiered Systems of Support (MTSS) and vice versa for special education experts.

Including checklists and sample forms

Manual authors unanimously agreed that providing information that educators can use immediately, such as checklists and forms, is helpful. When asked about the most useful features of Connecticut's manual, Glowski responded instantly, "The handouts, the checklists, the flowchart. For example, the handout that helps to determine, 'Is this Special education referral appropriate for an English learner?' That's so valuable. It was very well received." She added that the parent/caregiver/family interview form helps educators in determining whether or not a student may have a disability, but it also helps them better understand the background of their students. For example, by using the interview form:

> Educators can learn about the child's previous educational experiences, such as whether they attended school in an urban or rural setting, and the length of the school day. If a child was used to being home by noon or 1pm, they may be tuning out by 3 p.m.

Referring to the SELPA Administrators of California Association's resource book, Butterfield agrees: "Step by step forms, flowcharts, practical examples are much more helpful than theoretical information." Additionally, she pointed to the section in her manual that describes actual scenarios and shows how to discern between a learning disability or a language difference.

Piloting the manual to seek feedback before disseminating

Some states and districts piloted their manual before or as part of their initial dissemination. In particular, this was mentioned by Michigan, Minnesota and San Diego. After conducting stakeholder focus groups and incorporating feedback, Gaviria and Tipton in San Diego piloted the manual at schools. This involved meeting with a child support team who was going to meet about a student and giving live feedback on how it was working. After two rounds, Gaviria and Tipton made more changes. Also in San Diego, one large district school was chosen to pilot the documents prior to districtwide rollout. Special and general educators, including support staff and school administrators, implemented the process articulated in the manual, focusing on students of concern at their school site. Gaviria and Tipton then met with school staff and used their suggestions in document revisions and preparation of trainings.

In Minnesota, Watkins described how the pilot-testing of the current revision was a means both to solicit feedback on the information and to collect data. For example, the pilot began with both surveys and collection of information on current practices in the pilot districts. Post-surveys were done to gather feedback on the content. Meetings were held with EL and special education leadership in the pilot districts to identify areas of practice that needed to change as a result of the pilot and what types of support were needed to make these changes. This information is guiding dissemination and training of other districts around the state. Watkins went on to explain that the Minnesota Department of Education as a whole, and her division of special education in particular, has made a deep commitment to the use of the implementation science approach to continuous improvement.

Dissemination and Professional Learning

Some states and districts had explicit rollout or dissemination plans (San Diego, Michigan); these proved effective, according to manual developers. Several key recommendations mentioned by the manual authors included: (a) reaching out to administrators first; (b) being nimble with time, audience, and content; (c) promoting collaboration and offering transdisciplinary trainings/training for teams; (d) increasing awareness among parents (not just teachers); (e) delivering practical information in useful ways; (f) leveraging advisory groups and professional networks or associations; (g) developing a clear professional learning plan that demonstrates capacity for ongoing training; (h) promoting the manual annually at relevant meetings, given the potential for turnover; and (i) capitalizing on technology.

Reaching out to administrators first

Many times, administrators and principals are sometimes the last to receive new information, which can be counterproductive. In San Diego, authors Gaviria and Tipton explicitly set out to

share their process with administrators first, so they would be aware before trainings were held with the school staff. Fortuitously, in 2011, there was an upcoming training for all the administrators in the San Diego Unified School District, and Gaviria and Tipton were able to provide an overview. In this way, they had access to every principal in the school district.

Being nimble with trainings in terms of time, audience, and content

Authors described the need to be flexible in order to meet the needs of their audiences. For example, after the San Diego authors met first with administrators, they began training practitioners. For three weeks, they held two trainings per day, reaching about 500 educators. By reaching out to school psychologists, speech/language pathologists, and others, they began gaining access to more and more audiences. Further, Gaviria and Tipton not only provided trainings at a central location, but also offered to go to school sites during professional learning afternoons or meet with parents in the evenings. They also tailored their trainings for whatever time they were given—10 minutes, 45 minutes, 90 minutes, or a full day—showing tremendous flexibility and adapting for a specific audience. That way, as Gaviria described, "We consider, 'How much time are they giving us?' And from that, we can figure out what to do and which PowerPoint to use."

Promoting collaboration and offering transdisciplinary trainings and training for teams

There was consensus among manual authors that only when administrators, special education, general education, and EL program staff are working closely together can the needs of ELs with disabilities be effectively supported in an education environment. In the SELPA Administrators of California Association's resource book, Butterfield emphasizes the importance of collaboration. Since each child's language proficiency and academic needs differ so widely, she explained, it is inappropriate to create a single structure to guide districts in assessing these students and determining how to meet their specific academic and language needs. She and her colleague wrote in the manual:

> Collaboration across disciplines and grade levels cannot occur without an organizational structure that promotes interaction and communication. The local school level is the arena where collaboration can have an immediate impact on students. Although there is a strong movement toward collaboration, there are still many obstacles to be overcome in assisting ELs with disabilities. Unfortunately, teachers are often unaware of the types of information available from their potential collaborators; thus, they may not ask each other for specific information or request advice in developing instructional plans. In an informal collaborative setting, contributions from those of varying backgrounds may be neglected. The establishment of formal collaborative procedures can facilitate the exchange of information and ideas among different teachers and help foster the development

> of a collaborative and cooperative atmosphere that may lead to informal collaboration in the future. (Butterfield et al., 2017, p.57)

Similarly, the authors in San Diego explicitly set out to promote collaboration among general education and special education teachers and English learner specialists to break down "discipline barriers." They indicated that educators might see different aspects of a student than someone else looking at the same child from a different lens might see. These differences could result in supports that are more child-centered, effective, and comprehensive. Coming from the special education side, Tipton explained:

> A lot of the process relies on early intervention, so even if we just remove ourselves completely from [the EL side] as special educators, and say, "That's not my job," we realized we are going to need to work with our general education colleagues in order to know whether we truly are suspecting the disability or not, given what kinds of opportunities the students have had…. Conversations with our general education leaders and our instructional leaders is the only way that's going to happen.

Although the manual authors in San Diego continue to do trainings for individual role types, such as school psychologists, speech and language pathologists, and parents, they are especially proud of the transdisciplinary and central office trainings they conduct. Participants in these trainings range from English teachers to school site and district level English learner specialists to bilingual speech and language pathologists. Tipton and Gaviria are encouraged that so many groups are paying attention to and buying into the process.

In her district trainings around California, Butterfield recommends that school teams attend, including individuals from special education, the EL department, and administration. This has worked well:

> That part has been exciting for me. I now have pockets of teams around the state where I've got the EL people and the special ed people meeting monthly on how to support these kids. That's happening all over. That's really exciting for me.

Radford described high demand for trainings in Virginia, on collaborating to support ELs with disabilities. For the first-year pilot, she brought in teams of special education and ESL teachers, as well as a general education teacher or an administrator. It was so successful that it was offered twice this past year, reaching a total of 180 school teams. There are so many teams on the waitlist (hundreds of people) that Radford is working on a train-the-trainer model. Also in development is a year-long virtual book talk series, so teams of educators can take the information back to their school divisions with their special education, ESL, and general education teachers.

In Michigan, when Tabrizi, Sowers, or others conducted their trainings statewide, they stipulated that school- or district-wide teams of teachers of English learners and special education were invited to participate, not individuals. Psychologists, counselors, speech and language experts, principals, and classroom teachers were also members of the teams. Tabrizi and Sowers describe this as a powerful experience; in fact, they were in awe at the feedback they received afterward:

> The teams expressed excitement, saying, "We're here, and for the first time together, sitting at the table and discussing this challenging process together." It was an eye-opener…. So that was very exciting. We received great, great feedback.

Tabrizi went on to explain the importance of this teamwork, saying that "It's not going to work at the local level if it's one group versus the other [teachers of ELs versus teachers of special education]. We really need to have a team.

Increasing awareness among parents and community liaisons, not just teachers

Manual authors pointed out that in addition to educators, parents and community liaisons play an important role. In Minnesota, Watkins emphasized the role of school interpreters and cultural liaisons in family communication as well as with parent advocacy organizations, including PACER, the Parent Training and Information Center, funded by the U.S. Department of Education's Office of Special Education Programs (OSEP). PACER has a long history of providing multi-lingual and multicultural parent advocacy services. PACER's multilingual advocates also assist with staff development provided to interpreters and liaisons. It is helpful for them to talk with school personnel about ways of helping families in challenging situations and when to refer families to an independent advocate.

Watkins went on to emphasize the importance of having a cross-cultural lens for discussing special education services with families:

> I think about how the definitions of 'high ability' or 'lack of ability' have changed historically and how they're influenced by cultural differences…. The concept of [a] learning disability does not exist in many cultures. This is a helpful approach with parents, not having the absolute sense of 'this is a learning disability.' But [learning disability] is not purely objective, it's a construct that has been created. It is related to skills that we value at this time and place in our society. I think that's a helpful perspective for licensed staff—English speaking staff—to think about.

Watkins considers school interpreters and cultural liaisons as important informants and assets. Their insights into parent questions and concerns help to guide parent education activities and are also incorporated into professional learning for licensed special education staff. For example, Watkins turns to interpreters and cultural liaisons when developing resource materials

for parents, including videos for families whose home languages were not traditionally written. Instead of writing a script in English and having it translated, interpreters, liaison, parents, and advocates can work together to determine the themes and information to be communicated and then develop their own scripts.

In the SELPA Administrators of California Association's resource book, Butterfield et al. (2017) articulate the importance of collaborative teams providing services to ELs with disabilities to engage families in the process. The school experience for ELs is likely to be viewed differently by family members and school personnel. In the resource book she writes:

> Without information from the parents, many assumptions may be made about the students that do not reflect the parents' perspective. Parents can provide important information about the student's status and behavior in the family and in the community, as well as information about family and community norms. (p.58)

Gaviria and Tipton also noted the importance of parents being able to advocate for their children. When presenting to 120 parent volunteers from the District English Learner Advisory Committees (DELAC), they focused on a case study of a child to increase awareness of the process and empower the parents to advocate for their children.

Delivering practical information in useful ways

Manual authors explained how the delivery of information—in practical, useful terms—is essential. In San Diego, authors Gaviria and Tipton described how concrete guidance was needed in the form of questions to ask or situations educators might not have anticipated. For example, several years ago, they did an exercise with the principal in which they started at the beginning, looking at the cumulative file of a student to see how the student was identified for special education and whether that decision was appropriate. Gaviria had never met the child but she went through the cumulative file and gave a summary of what she had understood. The principal responded, "It's as if you know him more than we do!" Gaviria explained the importance of gathering and looking through the available information right away. She has been to IEP meetings when teachers are opening up the student's file for the first time and notice, 'Oh, it turns out the child needs glasses, and no one knew.'

Gaviria and Tipton cautioned against merely providing a laundry list of best practices to educators, because it's too overwhelming. Rather, by providing guidance on how to go about implementing those practices in a systematic way, involving other people outside one discipline, helps to make clear that the responsibility does not fall on one person. The focus shifts to 'how can supporting this child be something in which we all play a role?'

At her trainings in California, Butterfield insists that participants bring student IEPs or bilingual assessment reports, and she provides coaching on how to rate them appropriately. She believes that this hands-on work is effective. But even more than one-day trainings, Butterfield explained, what is needed is more in-depth work to help districts develop their own internal structures to provide support, guidance, and coaching.

Leveraging advisory groups and professional networks or associations

Authors relied on advisory groups and professional networks/associations not only to solicit feedback but to broaden dissemination. For example, in Michigan, the state Department of Education has an English learner advisory committee, representing local schools, local education agencies, and universities. Tabrizi headed this committee, which is considered "the eyes and ears of the department."

> They tell us what the concerns are, what the needs are, how our technical assistance has been effective, and they partner with us when providing professional learning to educators in the field. They participate in our annual Special Populations Conference.

With more than 600 participants, the conference provides another opportunity for discussion and further learning. Authors in Michigan described other statewide conferences where they disseminated the manual, including the Michigan Association of Bilingual Education and the Michigan Teachers of English to Speakers of Other Languages (TESOL) conferences.

In Minnesota, the state's Speech-Language-Hearing Association is very active in issues related to English learners and has helped to develop resource materials and provide their own trainings related to ELs with disabilities. Also, the state's Association for School Psychologists has invited speakers and provided training. Watkins explained that while she has worked together with the associations, they also initiate their own trainings.

In Virginia, Radford described several opportunities for training at existing meetings. For example, every summer, she and Ireland present at the Coordinators Academy for coordinators of all federal programs. They always present at meetings of the School Superintendents Association and the Principals' Association. They also 'piggyback' on the summer Title III Consortium Conference, the Virginia ESL Supervisors' Association, Head Start, the Family Engagement Network, and other related events. In the beginning, Radford and Ireland would propose sessions. But now, she says, the requests come to them.

Developing a clear professional learning plan that demonstrates capacity for ongoing training

States and districts shared information about the possibilities and limits of dissemination and professional learning. The authors in Michigan described their plans for building capacity to train educators. For example, the Michigan Department of Education EL Advisory plans to further train staff in their county areas and districts using distance technology (webinars and meetings using Zoom) to deliver the modules. They plan to build capacity by training more trainers, as well as work with special educators "to do something similar to what we did teaching reading to ELs throughout the state." Teams in Grand Rapids and in Dearborn want to be involved in further developing or expanding the training in their region as well as co-presenting with the Michigan Department of Education. When locals take this on, in addition to having a robust training of trainers (TOT) system, Tabrizi explained, you have true capacity building: "TOTs could be one person in special education, one person in EL. But then you have also districts and EL advisory who want to take it on and build capacity within their own district because it's so large."

In contrast, Connecticut did not have a plan for ongoing training after Glowski left the department. She regretted that an ongoing plan for professional learning was not realized. She shared her reflections about what she would have done differently in terms of dissemination:

> Part of the work has to be [asking ourselves], "And then what?" so what happened in Connecticut doesn't happen elsewhere. If we had given some time, once the manual was completed, to [ask], "Even though this is a great tool, concise, easy to use, and self-explanatory, how do we know it's not just going to sit in some office? How do we know it will be used as a guidepost?" The last step of this committee has to be to develop [a message]... even something as simple as on the last page either in a humorous way or a very serious way: "The reader of this document should ensure that it has a place in your district, and that the proper individuals who have control over the identification processes utilize this resource."

Similarly, in Minnesota, Watkins learned how making time for discussions after trainings was useful. Earlier on, school districts would request a training for all relevant staff but also time to figure out how to implement the recommended practices. She found these discussions to be as effective as or more effective than her standing in front of a group, simply sharing information. Watkins pointed out that these discussions can begin with basics, such as "Who has the information about a student?" She also encourages collaborative discussions to look at practices and develop a district process in the manual's system review chapter. Currently, Watkins is planning to build the dissemination and training plan for the updated state guidelines around this system review and planning process. There will be some traditional TOT elements, such as sets of slides

to present key information, but the emphasis will be on teams of facilitators helping educators and leaders work through these processes.

Promoting the manual annually at relevant meetings, given the potential for turnover

The topic of turnover came up repeatedly among authors, and Glowksi, in Connecticut, shared a suggestion for how to sustain a focus on the area of ELs with disabilities. After initial dissemination and training, the Connecticut manual was not continually promoted. Glowski attributes this to several factors: the project was complete, she left the Connecticut State Department of Education (CSDE) (turnover), and other topics have come up to take the place of this one:

> We got the blessing from the [CSDE], we put [the manual] up on the CAPPELL website, we made extra copies, people were charged to go back to their districts to begin to disseminate it, to share it, to make sure that every Director, at least, had a copy in their files, and to make people aware that it was available on the website…. It was a resource they wanted to develop, and make available… but there was no systematic plan to keep it alive.

Glowski reflected that, after she left the Department, no one continued to promote the manual at CAPELL meetings year after year, even though educators loved it. "No one thought to say, 'Don't forget. This is really one of our most important resources. Make sure your people know….' It could have been so simple, right?" Her advice speaks to turnover among educators as well; ongoing promotion is needed to make sure that new administrators and teachers incorporate the guidance.

Capitalizing on technology

Given the limitations of staff capacity to conduct trainings for professional learning, technology can present more opportunities for dissemination. Webinars were a key dissemination strategy in Virginia and Minnesota. In Minnesota, Watkins described how webinars have been part of the dissemination strategy, and offerings will continue to expand. The series that is currently available on the Minnesota Department of Education website is about five hours in total, broken into 10–30 minute segments. In the future, she hopes to develop additional webinars or videos that address specific topics and that are linked to the written materials.

Lessons Learned

When reflecting on the use and impact of the manuals, authors described both barriers and successes related to system-wide improvements. They also identified successes in this area, such

as changed teacher practice and policy or organizational changes, which suggest opportunities for those developing or revising guidance manuals.

Barriers

The most common barriers identified by manual authors included lack of interpreters and cultural liaisons, staff capacity to conduct trainings, turnover, the time it takes to find new ways of working, and inequitable opportunity for implementation across districts.

Lack of interpreters and cultural liaisons. In Minnesota, Watkins described the importance of training interpreters and cultural liaisons for carrying out the process. She noted that the state has a handful of Spanish speaking psychologists, speech clinicians, etc., and only one Hmong school psychologist and one Hmong speech clinician. Students in Minnesota come from 143 language backgrounds, so working with interpreters is necessary. Interpreters and cultural liaisons are the main means of communication with many families and it is essential that they receive training in special education so that parents, in turn, will receive accurate information. About 20 years ago, Watkins began to create a staff development program for interpreters that currently has three levels of training (basic, intermediate, and intensive). The intensive level consists of two courses developed by the University of Minnesota Program on Translation and Interpreting for interpreters working in special education—and she believes they are the only courses of their kind in the country. Additionally, the University assisted the department in developing a "Code of Ethics and Standards of Practice for Educational Interpreters of Spoken Languages" (Tapias-Heinrich, Homler, Downing, & Watkins, 2015). The document addresses appropriate roles and responsibilities but notes that this is an emerging field of practice and that professional practices are evolving. In the past two years, Watkins brought together members from a state organization that works to improve interpreting standards and a state organization for speech language pathologists with the goal of collaborating more effectively while following their respective ethical standards. This new model of inter-professional dialogue and professional learning is one that she hopes to expand to other fields.

One final recommendation for interpreters and liaisons is to create glossaries of technical terminology. Many special education concepts used in the U.S. do not exist in other languages and cultures. Watkins explained that it is important that community language experts reach consensus on how to best convey complex concepts. The Minnesota Department of Education has created special education glossaries in the Hmong and Somali languages. In many instances, the glossaries contain a translation of a term's definition because there is no exact equivalent.

Staff capacity to conduct trainings. Authors from every state and district mentioned the challenges of providing professional learning to accompany the manual. Working in Minnesota for many years, Watkins reflected that it was difficult to traverse the state, conducting one-day

trainings. She began to think about building capacity for systemic change, "to try to figure out how to do this and do it well." On the one hand, Watkins knew of districts that had embedded the practices into their procedures and that were fine-tuning them to adapt to changing needs. On the other, there were districts with rapidly growing EL populations, and leaders needed to create referral, assessment, and evaluation procedures from scratch. To assist with both, Watkins began to develop a system for collaboration, not just a training. Her collaborative planning guide, based on her experiences over many years with the EL and special education teams in several large districts, is the last chapter of the revised manual (in press). It contains multi-part tools that can be used by individual school sites or by entire districts for policies, procedures, and actual practice in coordinating EL and special education services.

In the first version of the SELPA Administrators of California Association's resource book, Butterfield printed hundreds of copies and distributed them to each SELPA. But now she uses an electronic version, which went out to all of the IEP vendors to post on their websites and to every SELPA director to disseminate to all of their districts. Training was not initially part of her plan. But soon, districts started begging Butterfield to provide training, which she did on her vacation time. When this proved too overwhelming, she developed a scale-up plan the next year, using a TOT model. To do this, Butterfield offered a training in four regions of California, for district-designated trainers. Butterfield would prepare them to do a training with their staff, which has been successful. She explained: "People were desperate for this information and wanted to learn. That's been the wonderful thing about it. I go to SELPAs, county education offices, and districts—at least two to three monthly. I also take field questions; I have thousands." Still, trainers did not stop people from calling her. She still receives at least three to five questions a week from districts around the state and from teachers, special education directors, bilingual coordinators, and EL teachers. And she still has a waitlist for trainings. Furthermore, Butterfield receives emails from teachers who are appreciative of having her as a responsive resource.

Turnover. Turnover can affect all aspects of the manual's use and professional learning. That is, new teachers, administrators, and instructional coaches may not know about the guidance and new state-level administrators may not have expertise in both EL and special education, as did the manual authors.

As Watkins explained, "The members of this first generation of experts [in Minnesota] have all retired. It's important to identify people who can be the next generation of trainers, leaders, researchers. This is something that is on my mind as I move closer to retirement." Some of these district leaders have intentionally identified and mentored younger colleagues to ensure continuity after they retire. Ongoing administrative support is also needed to maintain funding and organizational structures, including staff assignment, to promote the manuals.

In Virginia, Radford lamented the high turnover of teachers, administrators and superintendents. In terms of training, she shared, “Every year you feel like you’re starting over again. You go to present, and it’s a whole new set of faces.” Her hope is for the information to permeate the culture of a school, but turnover of teachers and leadership can have a detrimental effect.

Better teacher preparation may be a way to combat turnover. Radford described a new $1.3 million grant from the Office of English Language Acquisition, in partnership with Old Dominion University (ODU), to develop an ESL/special education certificate program. To begin with, ODU has two cohorts of teachers taking four online asynchronous classes, out of Newport News and Fairfax, to educate students in both areas. There also is a cohort of special education in-service teachers going through these modules, so they will know more about ELs with possible disabilities. Radford hopes that this program is one that can be adopted at other universities in Virginia and beyond.

New ways of working take time initially. In San Diego, participants in the initial focus groups led by Gaviria and Tipton raised an important concern about improving and unifying best practices. For example, participants noted that solutions to logistical limitations such as time for collaboration with team members, access to the documents, and professional learning were necessary to ensure the effective use and implementation of the documents. As Tipton explained:

> The challenge of time comes up. A transdisciplinary model requires collaboration and planning together, and it involves teams synthesizing data together, and analyzing things together, and you have to somehow find some way to give up other things that are taking up your time to do that. What may happen at school sites unfortunately could be that this is seen as additional work, instead of replacing some old habits with a more powerful process.

Typically, though, Tipton hears that the process is not a big burden for educators. He likes to think that they are already using most of these practices: “Maybe they didn’t have A–Z, they had A–W, then they just had to add X, Y, Z.” But other times, it feels like starting over. Once educators see the value of the process, however, it can actually save time. For example, while initially it might take extra time to get together to plan, put together all the data, do observations, and have conversations, in the end, a teacher can save time. For example, he or she might have mistakenly spent time on a long assessment when the students never had a disability in the first place, because some other factor that needed to be considered first should have been ruled out. Further, working in a transdisciplinary way ultimately reduces duplication of effort, Tipton explained. Perhaps all members of the team want to know certain things, from a parent, for example. Then, the teacher or whoever has the best rapport, or speaks the parent’s language and understands the culture, can do that piece.

While collaboration is critical for providing students what they need, Butterfield, on behalf of the SELPA Administrators of California Association, acknowledged the logistical challenges. "It is difficult enough sometimes to get an IEP team together", she said. "So if you are advising more people to be involved, that takes time and resources, and there can be resistance."

Inequitable opportunity for implementation across districts. It is difficult to reach low incidence districts where there are few ELs. These districts may not have the resources or the staff to send to trainings, or the colleagues with whom to collaborate to implement the practices in the manual.

Another challenge is supporting students whose home language is not a common one in the area. For example, Michigan has almost equal numbers of Spanish speaking and Arabic speaking students, and then three other large groups. But they have students speaking over one hundred other languages. This makes it difficult to implement recommended practices such as evaluating students (even orally) in their first language. In Minnesota, Watkins experienced a very similar challenge with small, low-incidence languages.

Successes

Authors also shared successes in the area of use and impact, such as changed teacher practice and policy or organizational changes. These successes suggest opportunities for others who are developing or revising guidance manuals. Few states or districts have conducted evaluations of practice before the development and dissemination of the manual or after. However, several have collected powerful anecdotal evidence of the changes in practice resulting from the manuals' use. In Minnesota, a pilot test is currently underway. Common threads include more informed practice (including awareness of extrinsic factors and new collaborations among educators) and policy or organizational changes.

More informed practice. Tabrizi described ways the manual influenced educators in Michigan:

> There was such an excitement and appreciation for rolling this out. During the training, after the training, I heard back from the surveys and from the field [the trainers], how districts refined or revised their practices, their procedures, or even wrote procedures they didn't have in place, referencing the Tools and processes in the handbook. For example, EL teachers reported that the school psychologist would refuse to discuss a referral. But because of the handbook and the PowerPoint from the modules, [the school psychologist] now is reconsidering.

Teachers in Michigan, after receiving the training, now delve into assessment of the student's content knowledge or language skills in their native language, as well as English, when possible. They had not done this before. As one teacher put it, "We didn't think we needed to do this, things like storytelling and retelling if we didn't have assessment in that language." Tabrizi

went on to reflect, “Changing the mindset is very powerful. If we can make that change in every district that is very powerful.”

Gaviria and Tipton in San Diego started to notice an increase in the awareness of the importance of extrinsic factors, which “wasn’t vocabulary that you heard before 2011.” School staff started discussing extrinsic factors when examining why a student was struggling. Interestingly, when piloting the process at one of the schools in San Diego, the principal decided to give each of the different sections of the extrinsic factors to different team members, which was illuminating. For example, the school psychologist had section B, which addresses personal and cultural factors. As Gaviria described it:

> The psychologist started to ask the student questions that might shed light on birth order or gender impacting her learning, and started by saying, “We’ve been noticing that you don’t do your homework.” The student replied, “Well, when I go home, I have a lot of other responsibilities. I’m in charge of cooking, and I’m in charge of cleaning the house, and that’s why I sometimes don’t get to my homework.” The psychologist, when we met with her afterwards, said, “I know if I didn’t have these guiding questions, [I may not] have ever figured that out; that it’s not that this child is irresponsible and she’s not getting their homework done. It’s actually that this child is very responsible, but comes from another culture, and comes with different factors that maybe we didn’t consider previously. I think the way, especially this form, the way it has enlightened me, is to think of things that you might not necessarily have ever thought about because you might not have gone through any of these types of things, and come from a very different reality.”

Tipton added that the transdisciplinary role that people are starting to play becomes important in the data gathering of early intervention/response to intervention (RtI). They have a better understanding of the factors impacting learning. For example, teachers are asking questions that support a school psychologist or a counselor because they realize their student seems to be going through some trauma. As Tipton put it, “They start learning to support kids across their disciplines. People are talking about cultural proficiency and looking at [student information] they’re missing.” They also are now building relationships with parents to find a respectful way to learn and gather sensitive information, such as through ethnographic interviewing. Tipton added that in their trainings, he and Gaviria advise not using the Extrinsic Factors form as a questionnaire, verbatim. Instead, they suggest asking open-ended questions that might lead to this information (e.g., “Tell me about a typical evening in your home”).

Similarly, in Minnesota, the manual provides guidance on the importance of socio-cultural factors. Watkins emphasized that the Socio-Cultural Checklist “has proven to have legs; people hold onto it and use it.” She sees that form being used in schools and it has been brought up at workshops she herself has attended. However, she cautioned that more training is needed in

this area, to prevent misuses. She attended one conference where the checklist was being used incorrectly, causing her to wonder, "If information is going to be disseminated, how do you make sure that the best instructions are there with it?"

Butterfield, speaking about SELPA Administrators of California Association's resource book, credits the manual and trainings for improving school- and district-level practices related to IEPs and student reclassification, including writing linguistically appropriate goals versus putting ELD goals in IEPs, not taking away ELD services from students, and appropriately reclassifying students (rather than just unilaterally having an IEP team reclassify them).

Policy or organizational changes. Several authors described system-level change that came about as a result of the manual. The San Diego authors described their process' impact related to online IEP programs and board policy. While the process was being developed, SDUSD had an IEP program called EXCEED, which included not just an IEP side, but also an RtI side. Some teachers were being trained in how to use RtI, by documenting goals and interventions online. But for various reasons, the online RtI work never really took off in the district. Currently the district uses a program called SEAS, and administrators insisted that questions be added to ask, "Did you initiate this process for your English learners?" Additionally, special educators are asked when they open a referral under a disproportionality consideration section of the IEP, "Did you begin this process and for the kids who are identified with an IEP, did you complete this process?" This lent support to the process over time, because it was built into the online system (which relates to compliance) and educators took notice. As Gaviria explained:

> When we first started to do presentations, [participants reacted with] "Oh, this is probably just something else that will go away, the way this [practice] went away, the way that philosophy went away. But, once it was part of that IEP online system, then they realized "This is real because I have to address this and I have to respond to this question."

Additionally, Gaviria and Tipton's administration took the process to the board, which approved it. This has been an advantage when doing presentations. As Gaviria put it, "This isn't just Tim and Angela doing this presentation and asking you to do this. This is a board approved process, a requirement."

Similarly, Watkins in Minnesota described how having a policy letter regarding eligibility worked to her advantage. Co-signed by the Director of Compliance Monitoring and the Director of Special Education Policy at the Minnesota Department of Education, the letter proved critically important, as it essentially communicated to districts that they do have flexibility in cases where standardized tests have limited validity because of cultural or linguistic differences. Watkins continues to share it with people all the time with the message, "You really can do things this way."

In California, Butterfield has seen both large and small districts commit themselves to using the manual in systematic ways. As just one example of several she gave, one small district outside of Sacramento was found to be flagged for disproportionality, and needed help with assessment practices. As Butterfield described:

> They have really embraced this work and made drastic changes in the way they were doing things. They weren't allowing any students to be reclassified. If a student is no longer an English learner, they need to be reclassified. But this district was not providing them with services.

Now, she explained, the EL department and the special education department are working together. They understand how writing an appropriate IEP and providing students appropriate services helps get them make progress and reclassify. She calls this, "Exciting to watch."

Discussion and Conclusion

The authors of the six manuals responded to clear signals from the field for guidance in this area, and their reflections can inform efforts by leaders at school, district, and state levels to ensure that ELs, and those with suspected disabilities, receive services matched to their needs as they progress through school. As a group, the manuals highlight the potential for a complementary, coordinated, and collaborative approach among teachers, administrators, and families to support ELs with disabilities in reaching their fullest academic potential. They include ways to promote more informed practice among educators (including awareness of extrinsic factors and new collaborations among educators). And they suggest avenues for organizational and policy changes to increase equity.

The manual authors never lost sight of the students at the center of their efforts. As Radford, in Virginia put it:

> [The impetus has to be] the child and the family. I always tell teachers in my trainings, "Think of this child as your child. You want to know that everything that can be done, has been done for this child before they go to case study. And then if they are identified as requiring two supports [EL and special education] to help move them along, then you need to make sure that the right people are at the right table at the right time to make that happen."

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Appendix

Interview Protocol

1. (Q1 was respondent contact information and permissions)
2. Impetus (OPEN-ENDED QUESTIONS)
    a. What was the impetus for creating the manual?
    b. Were there specific challenges you were learning about from the field that you wanted to address (e.g., were practitioners or families asking for guidance)?
3. Development process (OPEN-ENDED QUESTIONS)
    a. What were your goals and strategic approach (i.e., theory of action)?
    b. To what extent was this part of a larger strategy of building best practice and professional learning versus a compliance effort focused more on standardization?
    c. If part of a larger school improvement strategy, what other components are there?
    d. Who was primary audience for the manual?
    e. What was the desired outcome(s)?
    f. Who was involved?
        i. How was buy-in established?
        ii. How did you decide what research and resources to include?
        iii. How long did it take to complete?
    g. To what extent and how did you involve field practitioners, researchers, and other key stakeholders (advocates, parents, et al.) in the development of the manual?
    h. Did you use any protocols for inviting field input and comments (e.g., was it a transparent and inclusive process; did they have a panel appointed or solicited by nomination/application review process, etc.)?
    i. If you used any protocols, what were they?

4. Dissemination and professional learning (OPEN-ENDED QUESTIONS)
    a. How did you disseminate the manual?
    b. What kinds of professional learning were provided initially?
        i. What is happening now?
        ii. How effective do you think the training was?
    c. Were there any unexpected challenges or opportunities in terms of implementation in the field?
    d. Were any changes or updates made to the manual or follow-up documents produced in response to feedback received from the field?
5. Use and impact (OPEN-ENDED QUESTIONS)
    a. How is the manual used in districts and schools?
    b. What features were most needed/helpful?
    c. What evidence, if any, is there of changed practice on the part of educators?
        i. Are you aware of any data on special education and EL student achievement that you would attribute to changes in practice resulting from the manual?
        ii. Are you aware of any outcome data (i.e., more kids in early intervention, changes in patterns of referrals, more or less disproportionality, higher or lower rates of reclassification, etc.) that may have resulted from the manual?
    d. Did/does the manual serve its purpose?
        i. Can you describe some examples?
    e. Were there any policy or organizational changes that came as a result of the manual?
    f. Do you have any lessons learned you'd like to share, for other states or districts as they develop manuals? (OPEN-ENDED QUESTION)
6. Is there anything else you would like to tell me about the manual?

INSTITUTE on COMMUNITY INTEGRATION

UNIVERSITY OF MINNESOTA

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