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Lenford C. Sutton
University of South Florida

Phyllis Jones
University of South Florida

Julia White
University of South Florida

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Florida's Class Size Amendment and Co-Teaching: An Uneasy Partnership

**Lenford C. Sutton, Phyllis Jones,
and Julia White**

For nearly four decades, school finance has become progressively more central in school reform efforts aimed at improving student performance. At the same time, the focus of many school business officials and policymakers has turned to efficient uses of current resources in lieu of uniform increases in school funding. With regard to improving student achievement, class size reduction has become a popular state policy tool, but it remains one of the more costly education reforms, given the need to hire additional teaching personnel and provide additional classrooms. However, if co-teaching were allowed, capital costs associated with new classroom space could be reduced, or even eliminated. At the heart of this issue are two major concerns. While co-teaching as a class size reduction strategy may save money, does it provide the same educational benefits to students as a class half its size with a single teacher? In other words, is co-teaching more cost-effective? If not, across-the-board policies that restrict the use of co-teaching for class size reduction purposes may appear justifiable; but, on the other hand, do such policies have unintended, and possibly negative effects on other educational strategies, such as inclusion, where there is evidence that co-teaching can be effective? These are questions Florida educators and policymakers have struggled with in the wake of the passage of Amendment IX in 2002.¹

Given the popularity of class size reform, costs for implementation, and fiscal concerns of school business officials and policymakers, this article briefly reviews the literature on the efficacy of class size reduction, describes the context of Florida's adoption of a Class Size Amendment (CSA), and examines the benefits and challenges related to co-teaching instructional strategies. The final section discusses implications for other states considering class size reform.

Efficacy of Class Size Reform

In spite of mixed research evidence on the efficacy of class size reform, a number of states, including Florida, have adopted class size reduction measures. Some of the most widely cited empirical evidence supporting class size reform as a tool for enhancing student performance is found in the evaluation of the Tennessee's Project STAR study conducted by Word and colleagues in 1990.² This study of

some 6,000 students assigned to small and large K-3 classes revealed that students in small kindergarten classes on average outperformed those in larger kindergarten classes and continued to do so throughout their elementary school experience. In 1996, the state of Wisconsin implemented the Student Assurance Guarantee in Education (SAGE) program, which attempted to increase student achievement, particularly for low income children, by reducing K-3 class sizes to a 15:1 ratio, along with other reforms.³ Smith, Molnar, and Zahorik tracked the performance of SAGE students in 30 schools across 21 school districts between 1996 and 2001 by comparing the academic performance of SAGE students with the performance of comparable groups of students from non-SAGE schools within the same district. Overall, they found that SAGE students in grades 1-3 scored significantly higher on the reading, language arts, and mathematics subtests of the California Test of Basic Skills than did those in non-SAGE comparison groups.⁴

Conversely, in 1997, Hanushek reviewed 277 studies concerning the effects of classroom size in American public schools and found that only 15% of studies revealed a statistically significant, positive benefit from reducing classroom size.⁵ He noted that 72% of the studies found no relationship between student achievement and reduction of classroom size while 13% found unintended adverse effects. In a 1999 review of the Tennessee STAR evaluation, Hanushek challenged its methodology, concluding that any derived benefits from class size reduction were minimal.⁶ He maintained that the problem with the STAR project centered on its comparison of "something" to "nothing," and argued the large amount of funding used to reduce class size might have achieved greater utility if spent instead on maximizing teacher quality.

Florida's Class Size Amendment (CSA)

Background on the Florida Public School System

Section 1008.31 of the Florida Statutes establishes the mission and goals of Florida's K-20 education system and calls for a seamless and efficient system where all students, teachers, and parents work together to increase individual student performance.⁷ The public school system employs approximately 161,000 certified personnel who provide educational programs and services to over 2.6 million students at an operating cost of approximately \$18 billion annually.⁸ The system has approximately 3,600 schools buildings and, as expected, the passage of Amendment IX has created the need for additional classrooms above previous state long-term projections.⁹ It is estimated that by the year 2050, over 40% of the state's students will be racially, ethnically, and linguistically diverse.¹⁰ In Florida, the definition of student diversity includes those who have been identified as having special needs, approximately 20% of the state's student population.

Description of Florida's Class Size Amendment (CSA)

Over the last 15 years, more than 20 states have enacted constitutional and/or statutory provisions that in some way reduced the number of students assigned to teachers and classrooms.¹¹ In 2002, Florida voters joined their ranks by approving an amendment to the state constitution to reduce class size.¹² Under Amendment IX, class size reduction will be phased in between 2003-2004 and 2010-2011 through an annual two-student decrease in average number of students per classroom in a school district, until all classrooms in all school districts are at or below the constitutionally-mandated maximum class sizes: 1:18 in PreK-3 classrooms; 1:22 in grades 4-8; and 1:25 in grades 9-12.¹³ A subsequent law stipulated that compliance with

Lenford C. Sutton is Assistant Professor of Educational Leadership and Policy Studies at the University of South Florida, Sarasota-Manatee. Phyllis Jones is Associate Professor of Special Education at the University of South Florida, Sarasota-Manatee. Julia White is Assistant Professor of Special Education at the University of South, Florida Sarasota-Manatee.

average number of students per classroom would be measured at the district level for the period 2003-2006, school level for 2006-2008, and classroom level for 2008-2009 and beyond.¹⁴

Statutory provisions enacted after the passage of the amendment offered school districts 13 "implementation options":

- 1) Provide dual enrollment courses at community colleges.
- 2) Provide for enrollment in courses offered by the Florida Virtual School.
- 3) Repeal school board policies that require students to have more than the state-required level of 24 credits to graduate from high school.
- 4) Allow students to graduate from high school as soon as they pass the grade 10 FCAT and complete the courses required for high school graduation.
- 5) Use methods to maximize use of instructional staff, such as changing required teaching loads and scheduling planning periods, deploying district employees that have professional certification to the classrooms, and using adjunct educators.
- 6) Use innovative methods to reduce the cost of school construction.
- 7) Use joint-use facilities through partnerships with community colleges, state universities, and private colleges and universities.
- 8) Adopt alternative methods of class scheduling, such as block scheduling.
- 9) Redraw school attendance zones to maximize use of facilities while minimizing the additional use of transportation.
- 10) Operate schools beyond the normal operating hours to provide classes in the evening or operate more than one session of school during the day.
- 11) Use year-round schools and other nontraditional calendars that do not adversely impact annual assessment of student achievement.
- 12) Review and consider amending any collective bargaining contracts that hinder the implementation of class size reduction.
- 13) Use any other approach not prohibited by law.¹⁵

Co-teaching, an instructional strategy that positions two instructors within one classroom, quickly became a popular strategy for school districts.¹⁶ However, in June of 2005, Florida's State Board of Education adopted measures which effectively eliminated co-teaching as an acceptable method of complying with the CSA. The board prohibited any increase in the percentage of co-teaching classes utilized for the 2004-05 school year, and, commencing in 2006-07, school districts were no longer permitted to use co-teaching models for the purpose of complying with class size laws.¹⁷

The amendment also states that the cost of class size reduction was the responsibility of the legislature, not local school districts. School districts receive state funding through a categorical aid program, and their allocation is calculated via a special formula. However, the related law stipulates that school districts that do not meet the phase-in benchmarks set out in the amendment face a financial penalty for noncompliance.¹⁸ Under this law, the Florida Department of Education is empowered to remove a percentage of the school district's class size operating categorical aid "proportionate to the amount of class size reduction not accomplished" and transfer it to an approved capital

outlay fund for class size reduction within the same district.¹⁹ As late as February 2007, over \$5 million affecting 135 schools had been transferred for noncompliance.²⁰

Benefits and Challenges of Co-Teaching

The current research base on collaborative and co-teaching practices, although small, suggests these practices are potentially effective in improving the performance of all students in a class.²¹ For example, in 1996, Winking and colleagues found that effective inclusive teaching in the early years was characterized by collaborative classrooms where special education and general education team-teaching occurred in a heterogeneous mix of students with developmentally appropriate instruction, authentic assessment, and parent partnerships.²² In 1997, Ferranti applied this model to classrooms of older students and affirmed that co-teaching had the power to transform students and teachers alike.²³ In a 2006 study, Barnitt studied one Florida school district and found collaborative teaching increased the numbers of schools that reached federally mandated Adequate Yearly Progress (AYP).²⁴

Tilton defines co-teaching as an effective inclusive practice where general and special educators collaborate and teach together to meet a wide range of diverse learning needs in a classroom.²⁵ There are a variety of co-teaching approaches that can support the meaningful participation of students with diverse learning needs in the general education classroom:

- One teaches and one observes;
- One teaches and one supports in same curriculum content area;
- Station teaching of different curriculum content areas;
- Parallel teaching of same curriculum content area;
- Alternative teaching of same curriculum content area;
- Teaming on same curriculum content area.²⁶

In reflecting upon classrooms that are inclusive of students with diverse learning needs, Lipsky and Gartner identified five essential elements needed to respond to change in a positive way: partnership; collaboration; leadership; training; and flexibility.²⁷ In addition, Kluth, Straut, and Gartner found skilled and responsive teachers, effective partnerships with families, and visionary leadership were integral to effective instruction in an inclusive context.²⁸ These characteristics form the foundation of effective collaborative teaching and learning in a co-taught classroom. Collaborative practice can be viewed along a continuum of teaching practice. At one end of the continuum, there are simple consultative partnerships among professionals. At the other end are more involved partnerships which evolve through joint planning, teaching and evaluation, and shared responsibility for all students in the class.

According to Banks, co-teaching requires that teachers be open to inclusive pedagogical methodologies modeled after his levels of multicultural pedagogy: Contributions level; additive level; transformational level; and social action level.²⁹ Teachers who plan transformative lessons with the purposeful intent to co-teach can structure them in ways that are differentiated to meet the diverse needs of all students in the classroom.³⁰ In these classrooms, co-teaching is a marker of a caring community in which diversity is honored, the competence of all students is presumed, and general and special education resources are shared.

Co-teaching and the opportunity for reflective planning that accompanies this approach bring organizational challenges that require systemic facilitation. Arguelles, Hughes, and Schumm analyzed

effective co-teaching models and highlighted particular characteristics, such as common planning time; flexibility; risk-taking; defined roles and responsibilities; compatibility; communication skills; and administrative support.³¹ According to Thousand and Villa, it is a challenge for school administrators to create a school environment where such characteristics are nurtured and celebrated.^{32, 33} The infusion of multiple instructional agents in a classroom, such as co-teaching, must be supported in sensitive and creative ways. These involve ongoing, high quality professional development and sustained district and school level administrative support. This is most effectively done through the creation of a professional learning community environment where teachers, administrators, and policymakers can develop understandings and sensitively apply and evaluate skills and knowledge in their current contexts.³⁴

A major challenge to the practice of co-teaching in Florida, and thus, to inclusion, relates specifically to the State Board of Education's 2005 change of policy no longer permitting co-teaching as a method of class size reduction. Even if the teacher/student ratio in a co-taught classroom fell within the CSA mandate, the class would not be recognized as being in compliance with the law, and the district could be subject to a financial penalty for noncompliance. In some instances, schools committed to continuing the practice of co-teaching have developed "creative" approaches, like coding students through scheduling method codes for support facilitation, such as "S" (self-contained) for the general education co-teacher and "I" (in class one-on-one)³⁵ for the special education co-teacher. However, it appears that school districts may be reducing or eliminating co-teaching particularly where a general and special education teacher are teamed. In the 2002-2003 school year, 61% of classrooms that used the co-teaching model did so with a general and special education teacher. In 2003-2004, the percentage dropped to 44%; and in 2004-2005, it dropped further to 43%.³⁶

Discussion and Implications

Probably the most gratifying aspect of Florida's struggle with the implementation of class-size reduction is that the passage of Amendment IX represented the expressed will of Florida voters. Floridians, like those in many other states who have considered class size reform, are highly concerned about improving academic achievement and understand the enhanced quality of life education provides. However, the altruistic nature of voter support for public education evidenced in the passage of Florida's class size reduction amendment must be juxtaposed with the realities of the state's reluctant tax-paying citizenry. This has created a conundrum for legislators who must fund the initiative and school district officials who must implement it.

Adequate funding of the operational and capital construction needs for the implementation of Florida's Class Size Amendment remains a critical concern for education stakeholders. The limits on utilization of co-teaching models for CSA compliance may further increase school districts' facilities needs, while state-imposed financial sanctions on school districts for noncompliance, in the form of transfers of operating dollars to capital outlay reserves, may limit their ability to address projected teacher shortages.

Even in the face of mixed research evidence on the ability of class size reforms to improve student achievement and the significant new costs to implement such reforms, other states may find themselves faced with similar, voter-driven mandates. Class size reform can be expensive, a phenomena other states should consider before under-

taking it. Co-teaching is not a panacea for reducing class size and costs. In order to be effective, co-teaching, like inclusive practice, demands purposeful and meaningful planning, professional development, administrative support, and evaluation/quality assurance.³⁷ It is essential that if collaborative practices are to be utilized in class size reduction efforts, systems need to be developed to support the development of shared understandings by all involved, including policymakers, of what collaborative teaching and learning encompasses.³⁸ In the manner, they will realize that short-term expenditures for professional development, systemic planning, and evaluation will be offset by the long term-benefits of improved outcomes for all learners.

Endnotes

¹ Fla. Const., amend. IX, <http://www.fldoe.org/arm/class-size.asp>.

² Elizabeth Word, John Johnston, Helen Bain, Dewayne Fulton, Jayne Zaharias, Charles Achilles, Martha Lintz, John Folger, and Carolyn Breda, *Student/Teacher Achievement Ratio (STAR): Tennessee's K-3 Class-Size Study* (Nashville, TN: Tennessee State Department of Education, 1990).

³ Russ Kava and Layla Merrifield, *State Aid to School Districts*, Informational Paper 27 (Madison, WI: Wisconsin Legislative Fiscal Bureau, January, 2007), 18-20.

⁴ Phil Smith, Alex Molnar, and John Zahorik, "Class Size Reduction: A Fresh Look at the Data." *Educational Leadership* 61 (September 2003): 72-74.

⁵ Eric Hanushek, "Assessing the Effects of School Resources on Student Performance: An Update," *Educational Evaluation and Policy Analysis* 16 (Summer 1997): 141-64.

⁶ Eric Hanushek, "Some Findings from Independent Investigation of the Tennessee STAR Experiment and Other Investigation of Class Size Effects," *Educational Evaluation and Policy Analysis* 21 (Summer 1999): 143-63.

⁷ Fla. Stat. § 1008.31.

⁸ Florida Department of Education, *Florida Education Finance Program Statistical Report* (Tallahassee, FL: Financial Management Section of the Bureau of School Business Services, 2006).

⁹ Florida Department of Education, *Florida Inventory of School Houses* (Tallahassee, FL: Office of Educational Facilities, August 2007), <http://www.fldoe.org/edfacil/fishreports.asp?style=normal>.

¹⁰ Gwen Cartledge and Scott A. Loa, "Cultural Diversity and Social Skill Instruction," *Exceptionality* 9 (June 2001): 33-46.

¹¹ Caroline Hoxby, "The Effects of Class Size on Student Achievement: New Evidence from Population Variation," *The Quarterly Journal of Economics* 115 (November 2000): 1239-85.

¹² Fla. Const., amend. IX.

¹³ Note that Amendment IX defines class size as the "maximum number of students assigned to each teacher."

¹⁴ Fla. Stat. § 1003.03(2).

¹⁵ Fla. Stat. § 1003.03(3).

¹⁶ Since the adoption of Amendment IX, the use of co-teaching instructional models has escalated 260%, with more than 58 of the 67 school districts reporting its use to meet CSA requirements. See, Florida Department of Education, *Statistical Brief Series* (Tallahassee, FL: Bureau of Education Information and Accountability Services, 2007).

¹⁷ Linda Champion, Deputy Commissioner of Finance and Operations, Florida Department of Education, Memorandum to District School Superintendents, "Use of Co-Teachers to Reduce Class Size," July 13, 2005.

¹⁸ Fla. Stat. § 1003.03(4).

¹⁹ Ibid.

²⁰ Linda Champion, Deputy Commissioner of Finance and Operations, Florida Department of Education, Memorandum to Select District School Superintendents, "Class Size Reduction Transfers," February 28, 2007.

²¹ In addition, both the *Individuals with Disabilities Education Improvement Act* and *No Child Left Behind Act* endorse the use of co-teaching to provide students with disabilities access to the general curriculum with their nondisabled peers. See, *Individual with Disabilities Education Act (IDEA)*, 20 U.S.C. §§ 1400-1485; and *The No Child Left Behind Act of 2001*, Public Law 107-110.

²² Deborah Winking, Joanne Farley, Heather Schweder, and Linda Mabry, *Learning Together: Children's Progress in Integrative Early Childhood Education*, New York City Early Childhood Initiative Year II Evaluation (Oak Brook, IL: North Central Regional Educational Laboratory, 1995), ED 462 398.

²³ Jim Ferranti, "Finding a Common Ground: Special Education and General Education." *Primary Voices k-6 5* (August 1997): 30-34.

²⁴ Vikki Barnitt, *F.A.C.T. Folio* [Fostering Achievement and Community Together] (Tallahassee, FL: Florida Department of Education/Florida Inclusion Network, 2006), 17-19.

²⁵ Linda Tilton, *Inclusion: A Fresh Look—Practical Strategies to Help All Students Succeed* (Shorewood, MN: Covington Cove Publications, 2000).

²⁶ Victor Barnitt, *F.A.C.T. Folio* [Fostering Achievement and Community Together] (Tallahassee, FL: Florida Department of Education/Florida Inclusion Network, 2006), 13; Marylin Friend and Lynne Cook, *Interactions: Collaboration Skills for School Professionals* (White Plains, NY: Longman, 1996).

²⁷ Dorothy Lipsky and Alan Gartner, *Inclusion and School Reform: Transforming America's Classrooms* (Baltimore, MD: Paul H. Brookes Publishing Company, 1997).

²⁸ Paula Kluth, Diana Straut, and Douglas Bilken, "Access to Academics for All Students," in *Access to Academics for All Students: Critical Approaches to Inclusive Curriculum, Instruction, and Policy*, ed. Diana Straut, Paula Kluth, and Douglas Biklen (Mahwah, NJ: Lawrence Erlbaum Associates, 2003), 1-32.

²⁹ James Banks, "Approaches to Multicultural Curriculum Reforms," in *Multicultural Education: Issues and Perspectives*, ed. James Banks and Cheryl Banks (New York: Wiley & Sons, 2001), 225-46.

³⁰ Luana H. Meyer, Jill Bevan-Brown, Beth Harry, and Maron Sapon-Shevin, "School Inclusion and Multicultural Issues in Special Education," in Banks and Banks, 327-52.

³¹ Maria Arguelles, Marie Hughes, and Jeanne Schumm, "Co-Teaching: A Different Approach to Inclusion," *Principal 79* (March 2000): 48-51.

³² Jacqueline S. Thousand and Richard A. Villa, "Organizational Supports for Change Toward Inclusive Schooling," in *Creating an Inclusive School*, ed. Richard A. Villa and Jacqueline S. Thousand (Alexandria, VA: Association for Supervision and Curriculum Development, 2005), 57-80.

³³ It is also important that administrators and staff who choose to implement co-teaching be committed to parity and role sharing, shared leadership, which includes shared facilitation of team meetings, and shared responsibility for all students in the classroom in the service of thoughtful and meaningful implementation of access to curriculum, instruction, and assessment. (See, Paula Kluth, "You're Going to Love This Kid!" *Teaching Students with Autism in the Inclusive Classroom* (Baltimore, MD: Paul H. Brookes Publishing Company, 2003).

³⁴ Richard Dufour, Robert Eaker, and Rebecca Dufour, *Professional Learning Communities at Work: Best Practices for Enhancing Student Achievement* (Bloomington, IN: National Education Service, 2004).

³⁵ This code indicates that the teacher is responsible for one student, or a small group of students in a general classroom.

³⁶ Jeanine Blomberg, "Update on Co-Teaching" (Tallahassee, FL: Florida Department of Education, 2005), <http://www.fldoe.org/arm/pdf/81605sbe.pdf>.

³⁷ A significant issue that policymakers and administrators must consider is that of quality assurance. Currently, collaborative practices are being promoted in the name of CSA compliance with little or no systemic processes of evaluation apart from student head count. Clearly, for an initiative such as CSA, that has major fiscal implications, evaluation processes must relate to quality as well as quantity issues. Quality indicators need to be developed that evaluate collaborative practices across a school and district related to improved student learning and performance outcomes. Such an evaluation of student performance has to integrate multiple dimensions of assessment and evaluation that measure student growth and teacher success from a holistic perspective for all students in the classroom.

³⁸ A natural consequence of this greater understanding will be an acknowledgement of the need to provide effective professional development, both at the undergraduate, graduate, and post-graduate levels. For many teachers, teaching has historically been a solitary experience, and a move towards effective collaborative practices signifies a major change in professional roles and responsibilities in and across schools. For some, this will be a natural progression of their current roles and school contexts. Many special education teachers have experienced elements of collaborative teaching in their own practice, and some general education teachers have teamed together around curriculum content.