

University of Nevada, Reno

**Making Caseloads Manageable:
A Mixed Methods Study of Special Education Resource Teachers**

A dissertation submitted in partial fulfillment of the
requirements for the degree of Doctor of Philosophy in Education

by

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THE GRADUATE SCHOOL

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prepared under our supervision by

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Abstract

Managing a caseload of students with Individualized Education Programs (IEPs) is a demanding working condition for special education teachers (SETs). Large and unmanageable caseloads are important because of the connections to the instability of the SET workforce, including the longstanding SET shortage. Researchers have recommended hiring more SETs to reduce caseload sizes, yet the SET shortage makes this recommendation difficult. The purpose of this mixed methods explanatory design study was to examine the lived experiences of SETs who have large caseloads and perceive their workloads to be manageable. In the quantitative phase of the study, 119 Oregon resource SETs completed a survey with workload manageability items and demographics items, including questions about caseloads. Through a two-way ANOVA analysis, the results indicated that while there was no significant difference in perceived workload manageability among SETs with small or large caseloads, there was a significant difference among those with one to six or seven or more disabilities on their caseloads. In the qualitative phase, seven participants from the quantitative phase with larger caseloads than the mean and higher perceived workload manageability than the mean were interviewed. The interviews highlighted the themes of organization and support structures with the sub-themes of strategies, scheduling, administrative support, collegial support, and support staff. The quantitative results have implications for the field about the manageability of caseloads, and the qualitative results provide suggestions for school districts on low or no-cost methods to support SETs in managing their caseloads.

Keywords: special education teachers, caseloads, workload manageability

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Chapter 1: Introduction

The instability of the special education teacher (SET) workforce is an ongoing crisis (cf. Billingsley, 1993, 2004, 2005, 2011; Billingsley & Bettini, 2019; Billingsley & Cross, 1991). Currently, there is a critical shortage of SETs in 44 states (U.S. Department of Education, 2022) and SETs continue to leave the field at higher rates than general education teachers (Billingsley & Bettini, 2019; Goldring et al., 2014). Recruitment issues impact the shortage: the number of prospective SETs enrolled in traditional or alternative programs declined 30% between 2008-2009 and 2012-2013 (Sindelar et al., 2018). Additionally, the field experiences problems with SET retention. Recently, a national study found that 14.2% of SETs left the field (Carver-Thomas & Darling-Hammond, 2019). Several studies have examined SETs' intentions to leave the field (Albrecht et al., 2009; Berry, 2012; Bettini et al., 2017, 2020; Billingsley et al., 2004; Carlson et al., 2002a; Gehrke & Murri, 2006; Gersten et al., 2001; Haganan & Casey, 2018). Other factors impacting the SET shortage are burnout (Banks & Necco, 1990; Nichols & Sosnowsky, 2002; Robinson et al., 2019; Ruble & McGrew, 2013; Williams & Dikes, 2015; Wong et al., 2017) and stress (Bettini et al., 2020; O'Brien et al., 2019; Ruble & McGrew, 2013; Wong et al., 2017).

The SET shortage is concerning because hiring new SETs is expensive. One study estimated the cost of hiring a new SET to be between \$9,000 and \$23,000 (Milanowski & Odden, 2007), and another study estimated that attrition costs U.S. schools \$2.2 billion per year nationally (Alliance for Excellent Education, 2014). Districts must use their limited financial resources to hire new SETs to replace those who leave, rather than

spending the money on long-term district initiatives (McLeskey & Billingsley, 2008). Additionally, the jobs are often filled by unqualified SETs (Carver-Thomas & Darling-Hammond, 2017; Darling-Hammond et al., 2018). The shortage is more pronounced in schools with higher poverty (Alliance for Excellent Education, 2014; Carver-Thomas & Darling-Hammond, 2019; Darling-Hammond et al., 2018; Hanson & Yoon, 2018; Levin et al., 2015; Ronfeldt et al., 2013) and schools with higher proportions of students of color (Carver-Thomas & Darling-Hammond, 2017, 2019; Darling-Hammond et al., 2018).

The SET shortage can also have negative impacts on student outcomes (Ronfeldt et al., 2013). Ronfeldt et al. (2013) found that students in grade levels with higher turnover scored lower on English-Language Arts and mathematics assessments. Additionally, burnout can have negative impacts on students. Students of burned-out teachers can have negative behavioral outcomes (Wisniewski & Gargiulo, 1997; Wong et al., 2018), lower engagement (Wong et al., 2018), and negative academic outcomes (Irvin et al., 2013; Ruble & McGrew, 2013). Ruble and McGrew (2013) also found that students of burned-out teachers had poorer individualized education program (IEP) goal attainment and overall IEP quality. It is important to understand the reasons SETs want to leave the field because of the negative impact burnout and attrition can have on students.

Statement of the Problem

There are many reasons SETs leave the field or want to leave the field, making it a difficult problem to address (Brunsting et al., 2014). Working conditions are a key factor in the literature about the SET shortage (Bettini et al., 2017, 2018, 2020; Billingsley, 2004; Billingsley & Bettini, 2019; Brunsting et al., 2014). Working

conditions are important because they can impact teachers' instruction (Bettini et al., 2016a; Billingsley, 2011; Billingsley et al., 2020) and intent to stay in the field (Berry, 2012; Bettini et al., 2020). Because of the impact on students and teachers, Billingsley et al. (2020) argued that working conditions can be "a powerful lever for improving teacher effectiveness" (p. 8). There have been calls for future research that articulates the specific SET working conditions that are connected to attrition (Billingsley & Bettini, 2019; Gilmour & Wehby, 2020), as well as research that addresses how to better SET working conditions in order to improve teacher and student outcomes (Billingsley et al., 2020). Billingsley et al. (2020), using literature from general education and special education, defined SET working conditions as supports (e.g., administration, professional development, collegial interactions, schedules) and the roles and responsibilities that place demands on SETs.

A demanding working condition for SETs is managing a caseload of students with IEPs (Billingsley & Bettini, 2019; Billingsley et al., 2004; Giangreco et al., 2011a, 2011b; Hagaman & Casey, 2018; McLeskey & Billingsley, 2008; Suter & Giangreco, 2009). Nationally, caseload sizes are increasing, as are the severity of the students' needs (Dewey et al., 2017). Dewey et al. (2017) posited that these increases may negatively impact SETs' ability to serve students with disabilities. Other researchers have argued that large and unmanageable caseloads likely affect the quality of services students with disabilities receive (Carlson & Billingsley, 2010; Carpenter & Dyal, 2007; Dinnebeil et al., 2019; Ysseldyke et al., 2001) and three studies found evidence to support the claim that caseloads impact student outcomes (Algozzine et al., 1993; Doren et al., 2012; Giangreco et al., 2011b). Caseloads are important because they are connected to attrition,

intent, burnout, and stress (Albrecht et al., 2009; Berry, 2012; Billingsley & Cross, 1991; Brownell et al., 1997; Carlson et al., 2002a; Fimian et al., 1986; Fimian & Santoro, 1983; Hagaman & Casey, 2018; Haydon et al., 2018; Miller et al., 1999; Plash & Piotrowski, 2006; Williams & Dikes, 2015). SETs have described large and unmanageable caseloads as concerning (Billingsley, 2005; Carlson & Billingsley, 2010; Coleman, 2000; Carpenter & Dyal, 2007; Kaff, 2004; McCarty et al., 2003), overwhelming (Brownell et al., 2002; Eisenman et al., 2011; Miller et al., 1999; Moody et al., 2000), challenging (Berry & Gravelle, 2013; Dinnebeil et al., 2019; Hagaman & Casey, 2018; Lashley & Boscardin, 2003), and exhausting (Ansley et al., 2016; Billingsley, 2011).

A variable used to examine the manageability of SET working conditions is workload manageability (Bettini et al., 2017, 2018, 2020). There are connections between workload manageability and burnout (Bettini et al., 2017) and career intentions (Bettini et al., 2017, 2020), yet more research is needed to understand how workload manageability connects to other variables (Bettini et al., 2017; Billingsley & Bettini, 2019). Because caseloads are an SET working condition, and because workload manageability is a variable that assesses the manageability of working conditions, future research can use workload manageability to assess SETs' perceptions of their ability to manage their workloads, including their caseloads.

The SET shortage is a complex issue that impacts students, teachers, and districts. Because working conditions are one of the components related to the SET shortage, Bettini et al. (2017) suggested that district administrators reduce novice SET workloads by hiring more SETs and distributing responsibilities among more employees. Similarly, Billingsley and Bettini (2019) called for districts to monitor SET demands such as

caseloads and instructional time. Several researchers recommended that schools hire more SETs to reduce caseload sizes (Billingsley, 2005; Fore et al., 2002; Suter & Giangreco, 2009). The problem with this researcher recommendation is that although more SETs are needed to make caseloads more manageable, which could encourage SETs to stay in their jobs, there is a longstanding SET shortage that makes hiring difficult. Because of factors such as the SET shortage and limited district budgets, Bettini et al. (2018) argued that it can be difficult for districts to reduce SET demands and that districts should focus on increasing resources to retain SETs. Therefore, research into the resources that SETs use to manage their caseloads would benefit the field.

Purpose of the Study

The purpose of this mixed methods explanatory study was to examine the lived experiences of special education resource teachers employed in Oregon for the 2021-2022 school year who both have large caseloads and perceive that their workloads are manageable. First, a quantitative survey analyzed the connections between SETs' perceived workload manageability and their caseloads. Next, participants from the quantitative phase who have larger caseloads than the mean and higher perceptions of workload manageability than the mean were recruited for interviews. Although the quantitative phase occurred first, the qualitative phase had priority, as depicted in Figure 1.

Figure 1

Major Components of Research Study

Because of the shortage, it is difficult to fulfill the researcher recommendation of hiring more SETs to reduce large caseloads. In this study, the anticipation was that outlier participants with larger caseloads than the mean and higher perceptions of workload manageability than the mean would share insights into successful caseload management strategies and resources. The results of this study will impact the field by sharing the strategies and resources that SETs use to make their caseloads manageable. Findings may be used to improve preservice teacher education, as some preservice SETs do not experience managing a caseload during student teaching (Hagaman & Casey, 2018). Additionally, this study provides suggestions for teacher practice, and suggestions to districts on ways to structure caseloads to make them more manageable without the expense of hiring additional SETs. Lastly, this study has implications for policies about caseloads.

Definition of Terms

The following list includes key terms used in this study:

Shortage: In this study, the SET shortage is the number of special education positions that are left unfilled each year or are filled by unqualified teachers (Billingsley & Bettini, 2019).

Retention: SET retention describes SETs who stay in their current jobs (Billingsley & Bettini, 2019).

Attrition: Attrition means SETs who leave special education for activities outside of education, transfer to a special education teaching job at another school, or transfer to a non-special education job within education (Billingsley & Bettini, 2019).

Intent: Intent refers to SETs' stated plans to stay in or leave their current jobs (Billingsley & Bettini, 2019).

Burnout: Burnout is a lack of satisfaction in one's job that comes from a combination of emotional exhaustion, depersonalization, and a lack of personal achievement (Maslach & Jackson, 1981). Burnout tends to impact those in the helping professions, such as teaching (Maslach & Jackson, 1981).

Working conditions: For the purposes of this study, SET working conditions are supports (e.g., administration, professional development, collegial interactions, schedules) and the roles and responsibilities that place demands on SETs (Billingsley et al., 2020).

Workload manageability: Workload manageability is the degree to which teachers believe that their job responsibilities can be accomplished in a given time (Bettini et al., 2018).

Caseload: A caseload is the group of students with IEPs that an SET is responsible for managing (Ahearn, 1995; Hartman, 1980; Hogue & Taylor, 2020) through the coordination and implementation of services (Carpenter & Dyal, 2001, 2007; Coleman, 2000; Williams & Dikes, 2015). Caseload is different from the terms class size and student-teacher ratio.

Class size, student-teacher ratio: Class size and student-teacher ratio both mean the number of students that a teacher is instructing at any given time (Ahearn, 1995; Hogue & Taylor, 2020; Ysseldyke, 1988; Ysseldyke et al., 2001).

Conservation of resources (COR) theory: COR theory is a theoretical framework used to understand how workers use resources to meet the demands of their jobs (Alarcon, 2011).

Summary

The SET shortage is an ongoing problem in special education because it creates instability in the SET workforce. It is expensive for districts to hire new SETs each year and the jobs are often filled by unqualified SETs. The shortage also leads to negative student outcomes and disproportionately impacts schools with higher proportions of students of color and higher levels of poverty. Because of the negative impact on schools and students, it is important to understand the factors impacting the shortage. A general problem for some SETs is poor working conditions, which can contribute to burnout, stress, and attrition. Some of the problems with SETs' working conditions are related to their roles and responsibilities, such as unmanageable caseloads. Researchers recommended that districts reduce caseloads by hiring more SETs; however, the longstanding SET shortage makes this recommendation unfeasible. In this study, SET participants with large caseloads and higher perceived workload manageability than the mean were recruited to share strategies and resources that they use to manage their caseloads. The results of this study provide suggestions for teacher preparation and teacher and district practice.

Chapter 2: Literature Review

The instability of the special education teacher (SET) workforce has been discussed in the literature for decades (cf. Billingsley's work with colleagues, 1991, 1993, 2004, 2005, 2011, 2019). The SET shortage—the number of special education positions that are left unfilled each year or are filled by unqualified teachers (Billingsley & Bettini, 2019)—is an ongoing crisis. For the 2022-2023 school year, 44 states reported a critical shortage of SETs (U.S. Department of Education, 2022). Nationally, SETs left their jobs at a rate of 14.2% (Carver-Thomas & Darling-Hammond, 2019). California's shortage was described as acute (Darling-Hammond et al., 2018), and in Texas, attrition was highest among SETs, who left at a rate of 19% compared to 12% of other teachers (Sullivan et al., 2017). Between 2011-2012 and 2016-2017, one in five SETs in Idaho left their jobs (Hanson & Yoon, 2018). Similarly, in a study combining Colorado, Missouri, and South Dakota, Espel and colleagues (2019) found that teachers who left their jobs were most likely to be SETs. It is important to understand the factors impacting the SET shortage in order to support the retention of SETs.

This chapter describes issues related to SET recruitment and retention. Next, several working conditions impacting SET recruitment and retention will be presented, with a focus on SET caseloads. The chapter then discusses workload manageability, a variable used to analyze SET working conditions. Finally, conservation of resources (COR) theory will be presented as the theoretical framework guiding this study.

Recruitment

In the United States, there are two main paths to teacher licensure: traditional teacher preparation programs and alternative programs. In 2012-2013, 89% of people in

teacher preparation participated in a traditional program and 11% in an alternative program (U.S. Department of Postsecondary Education, 2015). Traditional teacher preparation programs are usually based at a university (Billingsley, 2011).

Alternative preparation programs were developed to address the teaching shortage (Chamberlin-Kim et al., 2019). Chamberlin-Kim and colleagues (2019) completed a systematic review of the literature on alternative preparation programs using a marketing theoretical framework. The authors found that alternative preparation programs commonly sought unlicensed teachers, paraeducators, and teachers licensed in other areas. In eight articles, people of culturally and linguistically diverse backgrounds were recruited, as alternative programs can recruit a broader swath of people into teaching. Of the ten articles with retention data, an average of 85% of alternative program participants completed the program (Chamberlin-Kim et al., 2019). Alternative programs have brought more teacher candidates into rural settings (Chamberlin-Kim et al., 2019), although SETs who left teaching or changed schools in one study were more likely to have been alternatively prepared (Gilmour & Wehby, 2020). Traditionally prepared SETs performed better on the Danielson teaching rubric than alternatively prepared SETs in one study (Mastropieri et al., 2011), and had stronger teaching quality scores in another study (Carlson et al., 2002a).

Another recruitment concern is declining overall teacher preparation program enrollment. There was a 30.4% decline in teacher preparation program enrollment between 2008-2009 and 2012-2013, which represented a loss of 200,000 potential teachers (Sindelar et al., 2018). A review of the demographics of the 500,000 teachers enrolled in all preparation programs in 2012-2013 showed inconsistencies between the

teachers being prepared and their students: 76% were female, compared to 49% of students who were female; 75% were white compared to the 51% of students who were white; and 11% were Hispanic/Latino compared to 25% of students who were Hispanic/Latino (U.S. Department of Postsecondary Education, 2015). These mismatches are also pronounced in special education; there is a need to recruit and retain SETs from culturally and linguistically diverse backgrounds (Billingsley, 2011; Kozleski & Proffitt, 2020). Scott and Alexander (2019) added that it was important to hire more Black male SETs.

Because of the critical shortage of SETs, some districts have hired unlicensed teachers. In California, 12,000 SETs worked without a teaching license in 2016-2017, double the 6,000 unlicensed SETs working in 2012-2013 (Darling-Hammond et al., 2018), and novice SETs without a license outnumbered novice SETs with a license (Carver-Thomas & Darling-Hammond, 2017). This is important because “teacher licensure is a proxy for quality” (Sindelar et al., 2019, p. 101), and students have better outcomes when they are taught by a licensed teacher (Billingsley, 2011; Feng & Sass, 2013; Gilmour & Wehby, 2020). Additionally, unlicensed SETs were at greater risk of leaving their teaching position (Miller et al., 1999) than licensed SETs.

Some suggestions in the research to improve SET recruitment were high school programs that foster interest in special education careers (e.g., the Teacher Cadet program, Today’s Students Tomorrow’s Teachers, Future Teachers Conference; Mamlin & Diliberto, 2020; Rude & Miller, 2018) and programs that help working adults change careers to special education (e.g., Troops to Teachers, the Resident Teacher program; Rude & Miller, 2018). Another way to support the novice SETs who have been recruited

into the profession is through induction (Billingsley, 2004, 2011; Bozonelos, 2008; Carlson & Billingsley, 2010; Leko & Smith, 2010; Sindelar et al., 2018; Vittek, 2015). Induction is a strategy of supporting novice SETs to improve their teaching quality and retention (Sindelar et al., 2018). SETs in one study who had induction support reported greater job manageability and self-efficacy (Billingsley et al., 2004). A good induction program has a variety of supports, collaborative opportunities, and coaching with a same-discipline mentor (Sindelar et al., 2018), which supports the retention of SETs.

Retention

SET retention is studied through several outcome variables, such as attrition, intent, burnout, and stress. Retention refers to the SETs who stay in their current jobs, while attrition describes SETs who leave special education for activities outside of education, transfer to a special education teaching job at another school, or transfer to a non-special education job within education (Billingsley & Bettini, 2019). Some studies of attrition reviewed for this chapter surveyed or interviewed SETs who recently left a job teaching special education, either to transfer schools or leave the field entirely (Billingsley & Cross, 1991; Brownell et al., 1997; Miller et al., 1999; Morvant & Gersten, 1995). Additionally, some studies tracked state data (Carver-Thomas & Darling-Hammond, 2019; Espel et al., 2019; Gilmour & Wehby, 2020; Sullivan et al., 2017) or national data (Alliance for Excellent Education, 2014) on teacher mobility. Studies of intent asked SETs about their career intentions, usually in the next one to five years (Albrecht et al., 2009; Berry, 2012; Bettini et al., 2017, 2020; Billingsley et al., 2004; Carlson et al., 2002a; Gehrke & Murri, 2006; Gersten et al., 2001; Hagaman & Casey, 2018). Studies of burnout (Banks & Necco, 1990; Nichols & Sosnowsky, 2002; Robinson

et al., 2019; Ruble & McGrew, 2013; Williams & Dikes, 2015; Wong et al., 2017) followed the work of Maslach and colleagues (1996), who conceptualized burnout in three variables: (a) *emotional exhaustion* refers to chronic emotional fatigue, (b) *depersonalization* refers to impersonal or negative responses toward students, and (c) *personal achievement* refers to feelings of self-efficacy or accomplishment. Stress was measured by researcher-created surveys (Cancio et al., 2018; Griffin et al., 2008; Miller et al., 1999) and existing surveys (Bettini et al., 2020; O'Brien et al., 2019; Ruble & McGrew, 2013; Wong et al., 2017). Although several outcome variables are used in the literature, the focus is the retention of qualified SETs for a stable SET workforce.

Attrition, intent, burnout, and stress are important because of their connections to student outcomes and other district outcomes. Attrition is expensive (McLeskey & Billingsley, 2008), as schools spend money to hire new teachers and provide induction support, professional development, and mentoring (Billingsley, 2011). One study found that overall attrition cost school districts about \$2.2 billion per year (Alliance for Excellent Education, 2014). Additionally, attrition disproportionately impacts schools with higher poverty (Alliance for Excellent Education, 2014; Carver-Thomas & Darling-Hammond, 2019; Darling-Hammond et al., 2018; Hanson & Yoon, 2018; Ronfeldt et al., 2013) and higher proportions of students of color (Carver-Thomas & Darling-Hammond, 2017, 2019; Darling-Hammond et al., 2018). Attrition also has negative impacts on student outcomes (Ronfeldt et al., 2013).

Similarly, burnout can impact student outcomes: students of burned-out SETs can have worse academic outcomes (Brunsting et al., 2014; Irvin et al., 2013; Wong et al., 2017), more behavior problems (Wisniewski & Gargiulo, 1997; Wong et al., 2018), and

poorer engagement (Wong et al., 2017) than students whose teachers are not burned-out. Additionally, Ruble and McGrew (2013) found that burned-out SETs can negatively impact individualized education program (IEP) goal attainment and overall IEP quality. These studies prompted McDowell (2017) to argue that burnout can lead to students with disabilities being denied access to a free and appropriate public education. Similarly, Miller et al. (1999) argued that the provision of a free and appropriate public education depends on the retention of qualified SETs.

There are several working conditions in the literature that influence SETs' stress, burnout, career intentions, and decisions to leave the field. Support from colleagues (Billingsley, 2011; Billingsley & Bettini, 2019; Bozonelos, 2008) and administrators (Ansley et al., 2019; Berry, 2012; Billingsley, 2011; Billingsley & Bettini, 2019; Griffin et al., 2008; Piotrowski & Plash, 2006; Vittek, 2015) are key factors in retention research. Inadequate planning time is another stressor (Griffin et al., 2008) that was a reason SETs left their jobs in one study (Plash & Piotrowski, 2006) and it was the second highest area of concern after caseload in another study (Coleman, 2000). Other important factors in the retention of SETs are professional development (Billingsley, 2004; Bozonelos, 2008; Carlson & Billingsley, 2010; Nichols & Sosnowsky, 2002) and school climate (Billingsley, 2011; Billingsley & Bettini, 2019; Bozonelos, 2008; Miller et al., 1999).

Recruitment of SETs is difficult, as enrollment in traditional and alternative preparation programs is declining. As a result, some SET jobs are filled by unlicensed teachers. Retention, another issue impacting the SET workforce, is studied through attrition, intent, burnout, and stress, variables that can have negative impacts on student outcomes. Some of the working conditions influencing SET retention are collegial and

administrative support, planning time, professional development, and school climate.

Working conditions, including caseloads, will be discussed next because it is important to understand the working conditions that impact SET recruitment and retention.

Working Conditions

As discussed in the previous section, several SET working conditions are connected to difficulties recruiting and retaining SETs (i.e., collegial and administrative support, planning time, professional development, and school climate). Another working condition, caseloads, will be discussed in the next section. SET working conditions are important because poor working conditions may contribute to “feelings of isolation, lack of opportunities to collaborate, and the lack of instructional and technical resources for their work” (McLeskey & Billingsley, 2008, p. 299). Poor working conditions may contribute to stress and make it harder to accomplish job tasks with quality (McLeskey & Billingsley, 2008). Good working conditions may encourage SETs to stay in their current roles (Bettini et al., 2017; Billingsley, 2004) and could mean that SETs have the time and materials needed to teach effectively (Bettini et al., 2017).

Studies of the SET workforce describe SET working conditions as school climate (Bettini et al., 2016a, 2017; Billingsley, 2004; Billingsley et al., 2004; McLeskey & Billingsley, 2008), administrative and collegial support (Bettini et al., 2016a, 2016b, 2017; Billingsley, 2004; Billingsley & Bettini, 2019; McLeskey & Billingsley, 2008; Nelson et al., 2001), planning time (Bettini et al., 2016a, 2017), resources (Bettini et al., 2016a, 2017; Billingsley & Bettini, 2019; Giangreco et al., 2011a), and salary (Billingsley & Bettini, 2019; Billingsley et al., 2004; McLeskey & Billingsley, 2008). Other factors described in SET working conditions research are class size (Bettini et al.,

2016a, 2016b, 2017), time for instruction (Bettini et al., 2016a, 2017), and bureaucratic responsibilities (McLeskey & Billingsley, 2008).

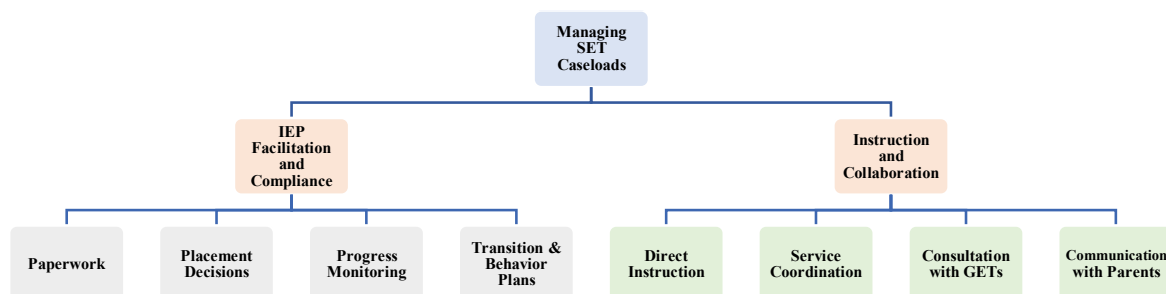
Another key factor that researchers identified as an SET working condition was caseload (Billingsley & Bettini, 2019; Billingsley et al., 2004; Giangreco et al., 2011a, 2011b; Hagaman & Casey, 2018; McLeskey & Billingsley, 2008; Suter & Giangreco, 2009). In the next section, the role of managing a caseload, considerations for determining caseloads, policies about caseloads, and the connections between caseloads and the SET shortage will be discussed. It is important to understand SET caseloads in order to support SETs in managing their caseloads.

Caseloads

A caseload is the group of students with IEPs that SETs are responsible for managing (Ahearn, 1995; Hartman, 1980; Hogue & Taylor, 2020) through the coordination and implementation of services (Carpenter & Dyal, 2001, 2007; Coleman, 2000; Williams & Dikes, 2015). Caseload is different from the terms “class size” or “student-teacher ratio,” both of which mean the number of students that a teacher is instructing at any given time (Ahearn, 1995; Hogue & Taylor, 2020; Ysseldyke, 1988; Ysseldyke et al., 2001). SETs who manage caseloads are also called case managers (Bon & Bigbee, 2011; Carlson et al., 2002b; Hogue, 2020; Johnson & Semmelroth, 2014; McCarty et al., 2003; Murzyn & Hughes, 2015; Park et al., 2001).

The Role of Managing a Caseload. In managing a caseload, SETs are responsible for writing and facilitating IEPs and ensuring IEP compliance. Additionally, managing a caseload involves instruction and collaboration. Figure 2 depicts a conceptual framework of the role of managing SET caseloads.

Figure 2

The Role of Managing SET Caseloads

Note. GET = general education teacher.

IEP Facilitation and Compliance. In the literature, researchers explained that one key component to managing SET caseloads is preparing for and coordinating IEP meetings for each student on their caseload (Bon & Bigbee, 2011; Carlson et al., 2002b; Carpenter & Dyal, 2001; Doren et al., 2012; Idol, 1988; Johnson & Semmelroth, 2014; McCoy & Glazzard, 1978; McLeskey & Billingsley, 2008; Murzyn & Hughes, 2015; Williams & Dikes, 2015). SETs are responsible for keeping the IEPs of students on their caseloads in compliance with district, state, and federal policies (Bon & Bigbee, 2011; Carpenter & Dyal, 2001; Hogue, 2020). To ensure compliance for the students on their caseload, SETs must write, organize, and distribute paperwork (Adelman & Taylor, 1998; Billingsley, 2005; Carlson et al., 2002b; Carpenter & Dyal, 2001; McCarty et al., 2003; McCoy & Glazzard, 1978; Murzyn & Hughes, 2015; Russ et al., 2001; Williams & Dikes, 2015). Ideally, the SET writes an analysis of the student's data before the IEP meeting and summarizes and distributes the IEP after the meeting so that the IEP team has all the necessary information to support the student (Adelman & Taylor, 1998).

In IEP meetings for students on their caseloads, SETs must make placement

decisions (e.g., general education with support, resource classroom, self-contained classroom) for each student with disabilities on their caseload (Bon & Bigbee, 2011; Conderman, 1998; Martin et al., 2004; Murzyn & Hughes, 2015). Although the IEP team should be involved in these placement decisions, Martin et al. (2004) examined the perceptions of 1,638 IEP team participants and found that the SET was the most active IEP team member in making placement decisions. Similarly, Murzyn and Hughes (2015) interviewed 15 IEP team members who explained that SETs tended to make the mathematics placement decisions for students with disabilities on their caseloads, as, “they were generally the person with the most holistic knowledge of the student” (p. 49). Because of this knowledge of each student on a caseload, Bon and Bigbee (2011) described managing a caseload as a leadership role.

In addition to making placement decisions, SETs have other duties related to IEP facilitation and compliance. SETs must monitor progress for each student on their caseload (Adelman & Taylor, 1998; Carlson et al., 2002b; Idol, 1988; Johnson & Semmelroth, 2014; What Works Clearinghouse, 2015). This means monitoring interventions, conducting evaluations (Adelman & Taylor, 1998), and tracking student progress (Carlson et al., 2002b; Idol, 1988; Johnson & Semmelroth, 2014; What Works Clearinghouse, 2015). Secondary SETs must also monitor transition plans with postsecondary goals for the students on their caseloads (Conderman & Katsiyannis, 2002; Doren et al., 2012), although the fast pace of the high school setting frequently leads SETs to focus on high school graduation rather than the transition plan (Oesterreich & Knight, 2008). Depending on student need, some SETs also develop and monitor behavioral plans such as Functional Behavioral Assessments and Behavior Intervention

Plans (Carlson et al., 2002b; Rosenberg, 2012).

Each of these duties related to IEP facilitation and compliance is time consuming. In one study, 80.1% of SETs reported they worked on paperwork daily (Wasburn-Moses, 2005), and in another study, SETs reported that they devoted almost 17% of their day to paperwork (Suter & Giangreco, 2009). Similarly, the analyses of SET time use by Vannest and colleagues (2010, 2011) found that participants spent an average of 12% of their day on paperwork. Carlson et al. (2002b) conducted phone interviews with 972 SETs, asking questions about their paperwork duties. Over half (57%) of the participants felt that the time devoted to paperwork and administrative duties was inadequate or adequate to a small extent, indicating that SETs could have spent even more time on paperwork than they already did (Carlson et al., 2002b). These findings led Carlson and colleagues (2002b) to conclude that, “Case management responsibility is significantly associated with the time devoted to paperwork” (p. 18).

Instruction and Collaboration. In addition to ensuring IEP facilitation and compliance, SETs are responsible for providing direct, specially designed instruction for students with disabilities on their caseloads (Bon & Bigbee, 2011; Burns, 2004; Carpenter & Dyal, 2001, 2007; Idol, 1988; Marston, 1996; McCarty et al., 2003; Suter & Giangreco, 2009). This can be instruction in any content area (Humphrey & Hourcade, 2010) over a range of grade levels (Banks & Necco, 1990; Burns, 2004; Carpenter & Dyal, 2001; Coleman, 2000; Gee & Gonsier-Gerdin, 2018; Giangreco et al., 2011a; McCarty et al., 2001; Russ et al., 2001; Yocom & Beglau, 1996). SETs also provide indirect services for students on their caseloads (Burns, 2004; Haight, 1984; Haight & Molitor, 1983; Idol, 1988), often in the form of consultation with general education

teachers (GETs; Carpenter & Dyal, 2001; Haight, 1984; Haight & Molitor, 1983; Huefner, 1988; Idol, 1988; McCarty et al., 2003; Murzyn & Hughes, 2015; Suter & Giangreco, 2009). In addition to instruction and collaboration, SETs coordinate the various services that students with disabilities on their caseloads receive (Adelman & Taylor, 1998; Carlson et al., 2002b; Carpenter & Dyal, 2001; Dinnebeil et al., 2019).

Another key component to managing SET caseloads is communicating with parents (Adelman & Taylor, 1998; Carpenter & Dyal, 2001; Dinnebeil et al., 2019; Giangreco et al., 2011b; McCarty et al., 2003; McCoy & Glazzard, 1978; Murzyn & Hughes, 2015; Park et al., 2001; What Works Clearinghouse, 2015). The SET is the main contact person and helps the IEP team work effectively with the parents of students on their caseloads (McCoy & Glazzard, 1978). Murzyn and Hughes (2015) recommended that SETs be considerate of parents' views and give parents paperwork ahead of IEP meetings. Bon and Bigbee (2011) added that it is important for the SET to develop trusting relationships with parents of students on their caseloads.

Managing SET caseloads includes the time-consuming duties associated with IEP facilitation and compliance, as well as direct and indirect instruction of students with disabilities, collaboration with GETs and other service providers, and communication with parents.

Considerations for Determining Caseloads. Given the components of managing SET caseloads, there are several considerations for schools and districts in determining SET caseloads, such as the total number of students, the range of student needs and disabilities, the age range, and the number of GETs supported.

Number of Students on the Caseload. When determining SET caseloads, districts

and administrators should consider the number of students on the caseload (Billingsley, 2005; Dinnebeil et al., 2019; Giangreco et al., 2011b; Giangreco & Suter, 2015; Huefner, 1988; McCarty et al., 2003). There was no consensus in the literature on the ideal size of SETs' caseloads. A few suggestions in the research were 15 students (Williams & Dikes, 2015), 17 students (Brozovich & Kotting, 1984), and 35 students (Idol, 1988).

Researchers in several studies asked SETs about the size of their caseloads. Table 1 describes the participants and the reported caseload numbers in each study. As noted in the table, there were several studies with a national sample, and a few studies in specific states. The caseload numbers ranged from two students to 41 students. Caseload sizes in one study were significantly larger in high-poverty districts than caseloads in low-poverty districts (Fall & Billingsley, 2011).

Table 1

Studies Reporting Information on SET Caseload Numbers

Study	Participants	<i>M</i> (<i>SD</i>)	Range
Algozzine et al. (1993)	18 state EBD consultants who reported the average SET caseload for SETs of students with EBD in their state	12.14 (6.47)	3.2-35.0
Berry and Gravelle (2013)	National sample of 203 SETs in rural districts	15.2 (8)	2-40
Fall and Billingsley (2011)	National sample of 935 SETs in high-	22 (12.4)	Not reported
	and low-poverty districts	18 (22.8)	Not reported
Giangreco et al. (2011b)	145 SETs in Vermont	10.38 (5.18)	Not reported

Study	Participants	<i>M</i> (<i>SD</i>)	Range
Suter and Giangreco (2009)	92 SETs in Vermont	10.80 (5.74)	5-41
Yocom and Beglau (1996)	34 special education administrators in Wyoming reporting their district numbers	11 (Not reported)	5-16
Ysseldyke et al. (2001)	National sample of 93 SETs	21.4 (Not reported)	6-26+

Note. EBD = emotional and behavioral disorders

Another way to understand caseload numbers is to compare the number of students with disabilities to the number of SETs. Dewey et al. (2017) examined national data of students with disabilities and SETs for each year from 2005-2012. The results showed that there were 4% fewer students with disabilities in 2012 compared to 2005, and 17% fewer SETs in 2012 than 2005. The average number of students with disabilities per SET was 14.29 in 2005 and 16.43 in 2012. Dewey et al. (2017) concluded that SET caseloads were increasing.

Large caseloads lead to difficulties for SETs. Large caseloads make it harder for SETs to support parents and families (Park et al., 2001). As one parent noted in a qualitative study of parents of children with disabilities, “How can I ask her to only pay attention to my son and teach him this or that when I know that she has many kids with various kinds of disabilities?” (Park et al., 2001, p. 166). Additionally, SETs may be less willing to do extra work such as student behavior plans when they have large caseloads (Rosenberg, 2012).

Range of Needs on the Caseload. Another consideration when determining SET caseloads is the range of needs and the severity of those needs (Burns, 2004; Dewey et

al., 2017; Russ et al., 2001; Yocom & Beglau, 1996), specifically the number of disabilities represented on the SET's caseload (Billingsley et al., 2004; Carlson et al., 2002a; McCarty et al., 2003). For example, some SETs only manage a caseload of students with learning disabilities, whereas other SETs may support students with learning disabilities, autism, other health impairments, or emotional and behavioral disorders (EBD). Billingsley et al. (2004) surveyed 1,153 novice SETs, asking several questions including how many disabilities were present on their caseloads. Of their respondents, 33% had four or more disabilities present on their caseloads, 44% had two or three, and 23% had one (Billingsley et al., 2004). Similarly, in a national survey of over 8,000 SETs, Carlson et al. (2002a) found that 24% of SETs had four or five disabilities present on their caseloads, 47% had two or three, 21% had one, and 8% had six or more. When there is a range of needs and disabilities on the caseload, SETs must teach a range of content that can be overwhelming (Billingsley, 2011; Gee & Gonsier-Gerdin, 2018).

Age Range on the Caseload and Number of GETs Supported. The age range of students on the SET's caseload is another important consideration (Burns, 2004; Carpenter & Dyal, 2001; Coleman, 2000; McCarty et al., 2003; Russ et al., 2001; Yocom & Beglau, 1996). The age range of students on the caseload is connected to the consideration of the number of GETs that the SET supports (Burns, 2004; Haight, 1984; Suter & Giangreco, 2009). Reducing the age range of students on the caseload reduces the number of GETs with whom the SETs teach and collaborate. It also reduces the number of curriculum and planning meetings they must attend and narrows the curriculum SETs must teach (Giangreco et al., 2011a; Giangreco & Suter, 2015). By

narrowing the age range, SETs can be more purposeful with their time in general education settings (Giangreco & Suter, 2015) and can have shared planning time with GETs (Carpenter & Dyal, 2007). As Coleman (2000) asked in her study of SET working conditions, “Can one teacher, even with a paraprofessional, be expected to teach multiple subjects, grade levels, and exceptionalities?” (p. 41).

Impact on Student Outcomes. These caseload considerations are important because large and unmanageable (i.e., several disability categories and a large range of ages and needs) caseloads can have an impact on students with disabilities. Some researchers argued that large caseloads with a range of ages and needs likely affect the quality of services students with disabilities receive (Carlson & Billingsley, 2010; Carpenter & Dyal, 2007; Dinnebeil et al., 2019; Ysseldyke et al., 2001). Other researchers emphasized the likely impact of large caseloads on the SET’s ability to individualize instruction for students on their caseload (Fall & Billingsley, 2011; Johnson & Semmelroth, 2014; McCarty et al., 2003; McLeskey & Billingsley, 2008; Moody et al., 2000; Russ et al., 2011), which probably impacts student outcomes (Dewey et al., 2017; Ysseldyke et al., 2001). Additionally, Fall and Billingsley (2011) argued that large caseloads make it more difficult for SETs to teach effectively and to manage student behavior.

Three studies added evidence to these claims about the impact of SET caseload on student outcomes. Algozzine et al. (1993) studied caseloads of SETs of students with emotional and behavioral disorders (EBD) and reported a predictive equation that as caseload size increased, predicted achievement decreased. Similarly, Doren et al. (2012) found that smaller caseloads significantly predicted stronger IEP goal quality. Lastly,

Giangreco et al. (2011b) studied SET caseloads in Vermont and found a significant negative correlation between caseload size and the percentage of time that SETs spent on instruction. The researchers found that for every additional student on SETs' caseloads, SETs' ratings of their ability to effectively provide special education services dropped by .12, or a full point for every 8 additional students (Giangreco et al., 2011b). This finding led Giangreco et al. (2011b) to question whether large caseloads lead to the provision of equitable and appropriate education for students with disabilities. As Suter and Giangreco (2009) asked, "What can we reasonably expect special educators to accomplish when they are spread this thin?" (p. 90).

To manage their caseloads, SETs write and organize IEP paperwork, ensure IEP compliance, provide direct and indirect instruction to students with disabilities, collaborate with GETs and other service providers, and communicate with parents. Schools and districts must consider a variety of factors when determining SET caseloads: the number of students, the range of needs and disabilities, the age range, and the number of GETs supported. These considerations are important because of the impact of large and unmanageable caseloads on student outcomes, although more research is needed in this area.

Caseload Policies. In addition to district-level decisions about SET caseloads, each state has different policies and expectations for caseloads, making distinctions between SET caseloads in different states difficult (Conderman & Katsiyannis, 2002). These policies can be vague, which some SETs find frustrating (Gee & Gonsier-Gerdin, 2018; Ysseldyke et al., 2001).

To understand the wide variety of SET caseload policies, five studies examined

SET caseload policies by state. First, Ysseldyke (1988) examined student-teacher ratios in several states and added a section about caseloads. The researcher explained that this task was difficult because some policies conflated the terms caseload, class size, and student-teacher ratio, although caseloads are different, as defined earlier in this review. Ysseldyke (1988) found policies for 39 states about caseload, student-teacher ratio, or both. The policies ranged in length from one to 500 pages, making comparisons difficult. Some of the factors used to determine caseloads were disability category, level of service, grade level, some combination of those factors, or a caseload formula combining factors (Ysseldyke, 1988).

The next three caseload policy reviews, Ahearn (1995), Project Forum (2000), and Jackson (2003), were conducted by Project Forum at the National Association of State Directors of Special Education. Project Forum examined topics related to the “management, administration, delivery and effectiveness of education programs and services” (National Association of State Directors of Special Education, 2020). After about 30 years of research, the project ended in 2012 (National Association of State Directors of Special Education, 2020). Ahearn (1995) analyzed 21 state policies about caseload or class size in special education. Three state policies discussed caseloads, six policies discussed class size, and 12 policies discussed both caseloads and class size. Ahearn (1995) explained that each policy was different and that states used different factors to set caseload and/or class size, such as average caseload, maximum caseload, disability category, age range, type of program, service provider, percentage of time the student was served in special education, formulas, or some combination of two or more characteristics (Ahearn, 1995). In 2000, Project Forum analyzed policies in 27 states;

each policy ranged in length from one sentence to eight pages (Project Forum, 2000). Project Forum (2000) characterized the factors used to determine caseloads or class sizes as prescriptive (e.g., disability, type of program, service provider, or some combination of criteria) or non-prescriptive if the policies were not specific. Next, Jackson (2003) updated Project Forum's (2000) review of caseload/class size policies and found 31 states with policies on caseload or class size. The factors states used to describe caseloads or class size were disability category, severity of disability, age range of students, presence of a paraeducator, educational setting, type of service, and some combination of the factors (Jackson, 2003).

Because the literature had not been updated on this topic since 2003 and because no review focused solely on caseloads, Hogue and Taylor (2020) reviewed the current state policies on SET caseloads and gathered information from 48 states. Reviewing this information, the researchers found that 20 states had no SET caseload policies, eight states mentioned caseloads in their policies but were not specific, and 20 states had specific policies about SET caseloads. Of the 20 specific SET caseload policies, each policy was different. Some factors used to determine caseloads were disability category, grade level, level of support, percentage of time in special education, paraeducator support, a formula, or some combination of two or more factors. Some states included a maximum number, such as 30 students per caseload in West Virginia. Other states were more specific, such as Nevada, which specifies by disability category and severity of the disability. The highest maximum number found in the policies ranged from 15 students per caseload in Minnesota to 50 students per caseload in North Carolina and Pennsylvania. The mean maximum number found was 31.56 students ($SD = 9.65$) per

caseload (Hogue & Taylor, 2020).

These studies about SET caseload policies showed how different special education is in each state. Only 40% of states had specific policies about SET caseloads, and each policy used different factors to determine caseloads. Some states organized their caseload policies by disability category, others by intensity of services. The highest number of students per caseload varied widely, although there was a stark contrast between 50 students per caseload permitted in North Carolina and Pennsylvania and the caseload numbers suggested in the literature of 15 students (Williams & Dikes, 2015), 17 students (Brozovich & Kotting, 1984), and 35 students (Idol, 1988) per caseload.

The role of managing a caseload is wide and complex. SETs must develop, facilitate, and implement IEPs that are compliant with state and federal laws. SETs also instruct students with disabilities and collaborate with the GETs of students on their caseloads. Because these duties increase with large and unmanageable caseloads, administrators must consider SET caseload size, range of needs and ages, and number of GETs supported when determining SET caseloads. No two state policies about SET caseloads are the same, and the numbers permitted in each state vary greatly, making caseload comparisons difficult.

Caseloads and the SET Shortage. As described previously, caseloads are one of the SET working conditions impacting SET workforce. Only one article about SET recruitment discussed caseload management. In Hagaman and Casey's (2018) study, preservice SET participants explained in interviews that they did not take full responsibility for their supervising teacher's caseload during student teaching. The supervising teacher would complete the IEPs, progress reports, and assessments for

students on the caseload (Hagaman & Casey, 2018). Hagaman and Casey (2018) theorized that because of this, preservice SETs may not understand the full demands of the job until they began it.

Although only one article discussed the connection between SET caseloads and recruitment, several studies connected SET caseloads to different outcomes (e.g., attrition, intent, burnout, stress) that impact SET retention. These studies are presented in Table 2. As Table 2 shows, twelve studies found a connection between SET caseloads and attrition, intent, burnout, or stress. SETs in those studies reported that large caseloads and caseloads with a broad range of ages and needs were a problem and caused stress, emotional exhaustion, made SETs want to leave their jobs, and were a reason they left their jobs. When SETs have a broad range of ages and needs on their caseload, they must accommodate, modify, and/or deliver direct instruction for a broad range of content and skills (Hogue & Taylor, 2020), making it difficult for SETs to focus their energy on specific strategies (Haydon et al., 2018). Of note, in one study, preservice and novice SETs perceived that SETs in general tended to leave the field due to large and unmanageable caseloads; however, special education administrators did not consider caseload a factor (Hagaman & Casey, 2018). This indicates that administrators may be unaware of a key working condition that has an impact on stress, burnout, intent, and retention.

Table 2

Studies that Examined SET Caseloads and Attrition, Intent, Burnout, or Stress

Outcome variable	Study	Method	Results related to SET caseloads
Attrition	Billingsley & Cross (1991)	Survey of 286 SETs in Virginia who transferred to general education	Large caseloads and too much paperwork were two key reasons for leaving their jobs. The authors found that caseloads contributed to attrition.
	Brownell et al. (1997)	Telephone survey of 93 SETs in Florida who had left their jobs	Of the 46 who left because they were disgruntled, large, diverse caseloads and paperwork were frustrating.
	Miller et al. (1999)	Survey of 1,152 SETs in Florida who stayed in their current job, left, or transferred	No significant differences in caseload size among the three groups.
	Plash & Piotrowski (2006)	Survey of 70 highly qualified SETs in Alabama who left their jobs	Most frequent reason for leaving was caseload size, followed by excessive paperwork.
Intent	Albrecht et al. (2009)	Mixed methods survey of 776 SETs of students with EBD	There was a significant difference in adequate time to complete paperwork between those who wanted to stay and those who wanted to leave.
	Berry (2012)	Telephone survey of 203 SETs; national sample	Significant negative association between caseload size and intent to stay.
	Carlson et al. (2002a)	Telephone survey of 8,061 special education service providers	Of those who intended to leave, 42% served students in four or more disability categories and 76% said that paperwork interfered with teaching to a great extent.

Outcome variable	Study	Method	Results related to SET caseloads
Intent	Hagaman & Casey (2018)	Three focus groups with 52 participants: preservice SETs, novice SETs, SE administrators	Large caseloads with a range of needs and paperwork are two reasons SETs want to leave
	Kaff (2004)	Survey of 341 SETs in Kansas	57% of SETs reported they had too many students with too large a range of strengths and needs. 45% considered leaving the field.
Burnout	Nichols & Sosnowsky (2002)	Survey of 77 SETs in self-contained classrooms	Number of disability categories did not significantly impact burnout. Caseload size did not significantly impact burnout.
	Williams & Dikes (2015)	Survey of 65 SETs in Alabama	Those with a caseload of 11-15 students had the lowest levels of emotional exhaustion, and those with a caseload over 26 students had the highest levels of emotional exhaustion. Those who spent more hours on paperwork had higher levels of emotional exhaustion.
Stress	Fimian et al. (1986)	Survey of 365 SETs in Connecticut in two groups: those who taught students with LD and those who did not.	Of 10 stressors, large caseload was the 7 th most frequent response. There was a significant difference between caseloads of SETs of students with LD and those of students with other disabilities. SETs of students with LD were significantly more likely to report that their caseload was too large.
	Fimian & Santoro (1983)	Survey of 365 SETs in Connecticut	Large caseloads with a range of needs were a frequently reported source of stress.
	Haydon et al. (2018)	Interviews of 16 SETs in the Midwest	Caseload size was a source of stress.

Note. LD = learning disabilities; EBD = emotional and behavioral disorders

Some of the studies in Table 2 contradicted the findings of the connections

between SET caseloads and retention. Miller et al. (1999) did not find any significant differences in caseload size among SETs who stayed in their current job, left, or transferred, although the authors noted that large caseloads with diverse learning and behavioral needs and excessive paperwork made SETs feel stressed. Miller et al. (1999) also found that large caseloads contributed to perceptions of poor school climate, one of the other factors impacting the SET workforce. Additionally, Nichols and Sosnowsky (2002) did not find any connections between caseload size or number of disabilities on a caseload and burnout. However, there were some outlier SETs with much higher caseloads than the mean; these SETs had the highest levels of burnout in the study (Nichols & Sosnowsky, 2002).

In addition to these research studies, authors of several literature reviews have used the literature to make claims about SET caseloads and attrition, intent, burnout, or stress. Unmanageable caseloads contributed to SET attrition in some studies (Billingsley, 2004; Billingsley & Bettini, 2019; Piotrowski & Plash, 2006; Russ et al., 2001) and manageable caseloads impacted retention in another study (McLeskey et al., 2004). Large caseloads with a range of needs contributed to burnout (Brunsting et al., 2014), made SETs feel stressed (Brownell et al., 2002; Emery & Vandenberg, 2010; Leko & Smith, 2010), and were a reason SETs intended to leave their jobs (Carlson & Billingsley, 2010). Additionally, excessive paperwork contributed to burnout (Brunsting et al., 2014) and made SETs feel stressed (Brownell et al., 2002; Emery & Vandenberg, 2010; Leko & Smith, 2010).

SETs reported that large and unmanageable caseloads were challenging (Berry & Gravelle, 2013; Dinnebeil et al., 2019; Hagaman & Casey, 2018; Lashley & Boscardin,

2003), frustrating (Brownell et al., 1997), and concerning (Billingsley, 2005; Carlson & Billingsley, 2010; Coleman, 2000; Carpenter & Dyal, 2007; Kaff, 2004; McCarty et al., 2003). Large caseloads with a range of needs made SETs feel overwhelmed (Brownell et al., 2002; Eisenman et al., 2011; Miller et al., 1999; Moody et al., 2000) and exhausted (Ansley et al., 2016; Billingsley, 2011). SETs perceived that school climate was negatively impacted by issues with their caseloads (McCarty et al., 2003; Miller et al., 1999). SETs also believed that large caseloads with a range of needs made it difficult to support all their students (Billingsley, 2004; Billingsley, 2005; Miller et al., 1999; Moody et al., 2000; Morvant & Gersten, 1995).

Large and unmanageable caseloads (i.e., caseload with a broad range of ages and needs) contribute to SET burnout, stress, career intentions, and attrition. This is important because of the negative impact of these variables on student outcomes and the expense of hiring and training new teachers. To address the issue of large caseloads with a range of needs, researchers recommended that administrators reduce the size of SET caseloads (Billingsley, 2005; Fore et al., 2002; Suter & Giangreco, 2009). However, a longstanding SET shortage (cf. Billingsley's work with colleagues, 1991, 1993, 2004, 2005, 2011, 2019) makes it difficult to hire enough SETs to reduce caseloads. It is important to find other ways to make caseloads a more manageable working condition in order to retain SETs. One way to assess the manageability of working conditions is through the variable, workload manageability.

Workload Manageability

Workload manageability is the degree to which teachers believe that their job responsibilities can be accomplished in a given time (Bettini et al., 2018). SETs in six

studies (Bettini et al., 2017, 2018, 2020; Billingsley et al., 2004; Fall & Billingsley, 2011; Giangreco et al., 2011b) have been surveyed about their perceptions of workload manageability in conjunction with other variables. Bettini and colleagues (2017, 2018, 2020) labeled the variable of interest “workload manageability,” while Billingsley et al. (2004) used the term “job manageability” and Giangreco et al. (2011b) used the term “special educator work rating.” Bettini et al. (2017, 2018, 2020) used the Workload Manageability scale. The Workload Manageability scale comes from the Michigan Indiana Early Career Teacher Study (Pogodzinski et al., 2013), as part of a larger survey with items from previous scales (e.g., Bryk & Schneider, 2002; Penuel et al., 2009). Giangreco et al. (2011b) analyzed “special educator work rating” through a researcher-developed survey. Fall and Billingsley (2011) and Billingsley et al. (2004) used the survey from the Study of Personnel Needs in Special Education (SPeNSE; Carlson et al., 2002b). These six studies will be discussed together because of the similarities found in the wording of the survey items.

Table 3 quotes the items that address workload manageability in studies of SETs. Several of the studies included a general item asking participants about the extent to which they believed their workload was manageable (Bettini et al., 2017, 2018, 2020; Billingsley et al., 2004; Fall & Billingsley, 2011). Four studies asked participants the extent to which administrative duties and paperwork (Bettini et al., 2017, 2018, 2020) or routine duties and paperwork interfered with their teaching (Fall & Billingsley, 2011). Bettini and colleagues (2017, 2018, 2020) added an item about perceptions of working too hard on participants’ jobs. Bettini et al. (2020) also asked participants whether they perceived they had too much work to do and whether they felt they had enough time to

do their jobs well. Fall and Billingsley (2011) included items about participants' caseloads, and Giangreco et al. (2011) connected workload manageability to participants' perceptions of their ability to provide instruction to their students with IEPs.

Table 3

Surveys of SETs with Items Assessing Workload Manageability

Study	Sample	Items Assessing Workload Manageability
Bettini et al. (2020)	171 SETs of students with EBD of national sample	I feel I'm working too hard on my job. There is too much work to do. I have enough time within designated school hours to do my job well. Administrative duties/paperwork interfere with my instructional responsibilities. My workload is manageable.
Bettini et al. (2017)	61 novice SETs and 184 novice GETs in Michigan and Indiana	I am teaching with adequate resources and materials to do my job properly. My workload is manageable. I feel I'm working too hard on my job. (reverse scored) Administrative duties/paperwork do not interfere with my teaching.
Bettini et al. (2018)	Same data set as Bettini et al. (2017)	Same as Bettini et al. (2017)
Billingsley et al. (2004)	1,152 novice SETs; national sample	Thinking about your total job, including your professional responsibilities, to what extent do you agree that your workload is manageable?
Fall & Billingsley (2011)	935 novice SETs from low-, mid-, and high-poverty schools; national sample	Think now about your total job, including all your professional responsibilities. To what extent do you agree that your workload is manageable? Routine duties and paperwork interfere with your job of teaching. Necessary materials are available when you need them. What is the total number of children you teach in a week?

Study	Sample	Items Assessing Workload Manageability
Giangreco et al. (2011)	145 SETs, 23 principals, 6 SE administrators in Vermont	Percentage of students who are from CLD backgrounds. Percentage of students who are ELLs. My current work responsibilities (e.g., caseload size and configuration) are conducive to providing effective special education to students I serve on IEPs.

SET workload manageability was studied with several variables such as teacher preparation (Fall & Billingsley, 2011), caseload characteristics (Billingsley et al., 2004; Giangreco et al., 2011), administrative support (Bettini et al., 2020; Fall & Billingsley, 2011), and collective responsibility for teaching students with disabilities (Bettini et al., 2018, 2020). Bettini et al. (2017) compared novice SET and GET perceptions of workload manageability and examined whether workload manageability could predict career intentions or emotional exhaustion in either group. Novice SETs were significantly less likely than novice GETs to agree that they had enough resources and materials to do their jobs properly or that administrative duties and paperwork did not interfere with their teaching. Additionally, a structural equation model showed that SETs' perceptions of workload manageability significantly negatively predicted their levels of emotional exhaustion in the spring. There was no direct significant relationship between workload manageability and career intentions in the model, but there was a significant indirect relationship through emotional exhaustion for both SETs and GETs (Bettini et al., 2017). Similarly, Bettini et al. (2020) studied workload manageability's relationship to emotional exhaustion, stress, and career intentions among SETs of students with EBD, among other variables. The researchers found that workload manageability significantly

predicted emotional exhaustion and stress, and emotional exhaustion predicted career intentions. The structural equation model showed that workload manageability significantly indirectly predicted career intentions, mediated by stress and emotional exhaustion (Bettini et al., 2020). These two studies indicated a relationship between workload manageability and career intentions.

The studies about SET workload manageability have several strong components. Two studies have samples of more than 900 SETs (Billingsley et al., 2004; Fall & Billingsley, 2011) and three studies had a national sample of SETs (Bettini et al., 2020; Billingsley et al., 2004; Fall & Billingsley, 2011). However, these studies were completed by a relatively narrow pool of researchers, as evidenced by the repetition of names in the citations. More research is needed in SET workload manageability by a broader pool of researchers.

SET workload manageability is an area worthy of more research (Bettini et al., 2017; Billingsley & Bettini, 2019). Studies have found connections between SET workload manageability and SETs' career intentions and their levels of emotional exhaustion. Because caseloads are an SET working condition, and because the Workload Manageability scale asks questions that assess the manageability of working conditions, the Workload Manageability scale is a beneficial tool to assess SETs' perceptions of their ability to manage their workloads, including their caseloads.

Theoretical Lens

The theoretical lens guiding this study is COR theory. COR theory has been used in special education research to understand workload manageability in SETs (Bettini et al., 2017, 2018, 2020) and other factors related to SET turnover (Gilmour & Wehby,

2020). Bettini et al. (2018) used COR theory to argue that district administrators should either reduce SET demands or increase resources.

COR theory originated in the study of stress (Hobfoll, 1989). Hobfoll (1989) presented COR theory as the idea that people seek to attain, create, and maintain resources; stress occurs when these resources are threatened or lost. Hobfoll's description of COR theory (1989) was informed by Maslow's (1968) theory that people first seek physical resources, then social resources, and finally psychological resources. In organizational research, COR theory contends that workers use resources such as time and energy to meet the demands of their jobs (Alarcon, 2011). Alarcon (2011) conducted a meta-analysis of 231 studies of burnout in the workplace and related them to COR theory. Results suggested that when demands exceeded resources, workers responded by reducing the energy they used to complete components of their work (Alarcon, 2011). Resources workers use are divided into four categories that help workers adapt to their environment: objects, conditions, personal characteristics, and energies (Alvaro et al., 2010; Salanova et al., 2010). Objects are physical items such as food; conditions are structures, such as good health; personal characteristics are traits or skills; and energies are resources which have value because they can be exchanged for other resources (Alvaro et al., 2010).

In this proposed study, COR theory was the theoretical lens used to analyze how SETs use resources to manage the demands of their caseloads.

Research Questions

Chapter two discussed the recruitment and retention crisis in special education, including the working conditions, particularly caseloads, that impact recruitment and

retention. The following four research questions will guide the next chapter.

Quantitative Questions

1. What are the caseload characteristics of the participants in this study?

Specifically:

- a. What are the caseload characteristics (size, age range, number of disabilities) of elementary, middle, and high school resource SETs in this study?
- b. What are the caseload characteristics (size, age range, number of disabilities) of rural, urban, and suburban resource SETs in this study?

2. Are there differences in perceived workload manageability among resource SETs with varying caseload characteristics? Specifically:

- a. Is there a difference in perceived workload manageability between resource SETs with small and large caseloads?
- b. Is there a difference in perceived workload manageability between resource SETs with one to six disabilities on their caseload and resource SETs with seven or more disabilities on their caseload?
- c. Is there a difference in perceived workload manageability between resource SETs with small and large caseloads who have one to six or seven or more disabilities on their caseload?

Qualitative Question

3. In what ways do resource SETs with large caseloads and high perceived workload manageability use resources (e.g., objects, conditions, personal characteristics, and/or energies; Salanova et al., 2010) to meet the demands of case management?

Mixed Question

4. In what ways do interviews with resource SETs about managing their caseloads help to explain the perceived manageability of their workloads?

Summary

This chapter presented a brief overview of the recruitment and retention crisis in special education, followed by a discussion of working conditions, particularly caseload, that impact the field. Next, workload manageability was presented as a variable used to study SETs' perceptions of their working conditions. Finally, COR theory was introduced as the theoretical framework guiding this proposed study.

Chapter 3: Method

The field of special education continues to experience a shortage of special education teachers (SETs). There are several working conditions that impact the retention of SETs, such as school climate, collegial and administrative support, planning time, professional development, and caseloads. Managing a caseload is a complex working condition that involves facilitating individualized education program (IEP) meetings, keeping the related paperwork in compliance, monitoring student progress, delivering instruction, and collaboration with staff and parents. Large and unmanageable caseloads are one of the working conditions that influence attrition, intent, burnout, and stress. Workload manageability is a variable in the literature used to analyze SET working conditions, often guided by the lens of conservation of resources (COR) theory. A key recommendation in the literature is to reduce SET caseloads by hiring more teachers, yet the field continues to experience a shortage of SETs. In this mixed methods (MM) explanatory sequential study, the lens of COR theory was used to explain how SETs use resources to manage the demands of their caseloads.

Mixed Methods Definition

In MM research, researchers collect and analyze quantitative and qualitative data in response to research questions (Anderson, 2018; Corr et al., 2020; Creamer, 2018; Creswell, 2015; Creswell & Creswell, 2018; Creswell & Plano Clark, 2018; Hesse-Biber, 2010; Johnson & Christenson, 2017; Johnson & Onwuegbuzie, 2004; Mertens, 2015; Onwuegbuzie & Johnson, 2006; Plano Clark & Ivankova, 2016). The data and results are integrated (Anderson, 2018; Brannen & O'Connell, 2015; Collins, 2015; Creamer, 2018; Creswell, 2015; Creswell & Creswell, 2018; Creswell & Plano Clark, 2018; Johnson &

Onwuegbuzie, 2004; Klingner & Boardman, 2011; Maxwell et al., 2015; Mertens, 2015; Onwuegbuzie & Johnson, 2006; Plano Clark & Ivankova, 2016; Tashakkori et al., 2015), and all the procedures are aligned within a specific research design, which is seen through the lens of theory and philosophy (Creswell & Plano Clark, 2018; DeCuir-Gunby & Schutz, 2017).

MM research is the best method to answer the research questions in this study because there is a need to explain quantitative results with qualitative data (Creswell & Creswell, 2018; Creswell & Plano Clark, 2018). Quantitative research is needed to analyze the connections between SET caseloads and workload manageability. More qualitative research is needed to understand how SETs with larger caseloads make their workloads manageable. This study adds to the literature about SET workload manageability and delves deeper into a seldom-researched topic: SET caseloads. The results will impact SETs by illuminating the perceptions and strategies of SETs who manage large caseloads. This study may also impact state policies regarding caseload that could benefit special education students and teachers alike.

This study is informed by the philosophy of dialectical pluralism, which is the perspective that multiple paradigms can be used in MM research, as long as the researchers are clear in their use (Creswell & Plano Clark, 2018; Greene, 2007; Greene & Hall, 2010; Mertens, 2015). Researchers who use dialectical pluralism believe that the values of the researchers and the stakeholders should guide the study, which should be conducted with honesty, trust, and fairness (Creswell & Plano Clark, 2018) as a method to engage with different perspectives and ways of gaining knowledge (Creamer, 2018; Greene, 2007; Hitchcock et al., 2018; Johnson & Christenson, 2017). Because

explanatory sequential designs begin with quantitative methods, followed by qualitative methods, Creswell and Plano Clark (2018) encouraged researchers to use different paradigms for each phase of the study. Through dialectical pluralism, two paradigms guided this study. A postpositivist view guided the quantitative phase; a postpositivist view helps a researcher determine questions, variables (i.e., workload manageability, caseload size, number of disabilities on caseloads), and measures for the first phase of the study (Creswell & Plano Clark, 2018). A constructive view guided the qualitative phase. Constructivism is a worldview focused on understanding phenomena through participant experiences (Creswell & Plano Clark, 2018). The focus of this study was understanding the lived experiences of resource SETs who manage large caseloads.

The theoretical framework guiding this study was COR theory, which posits that workers use resources to meet job demands (Alarcon, 2011; Hobfoll, 1989). COR theory suggests that when resources and demands are balanced, workers feel they can manage their workloads and feel more positively about their jobs, but when there are more demands than resources, workers may feel more negatively about their jobs (Alarcon, 2011).

Mixed Methods Design

This study used an explanatory sequential design in which the quantitative data were collected first and informed the collection and analysis of qualitative data (Creswell, 2015; Creswell & Creswell, 2018; Creswell & Plano Clark, 2018; Plano Clark & Ivankova, 2016). An explanatory sequential design best fit this project because the intent of an explanatory sequential design is to explain the quantitative results with qualitative data (Creswell, 2015; Creswell & Plano Clark, 2018; Plano Clark & Ivankova, 2016).

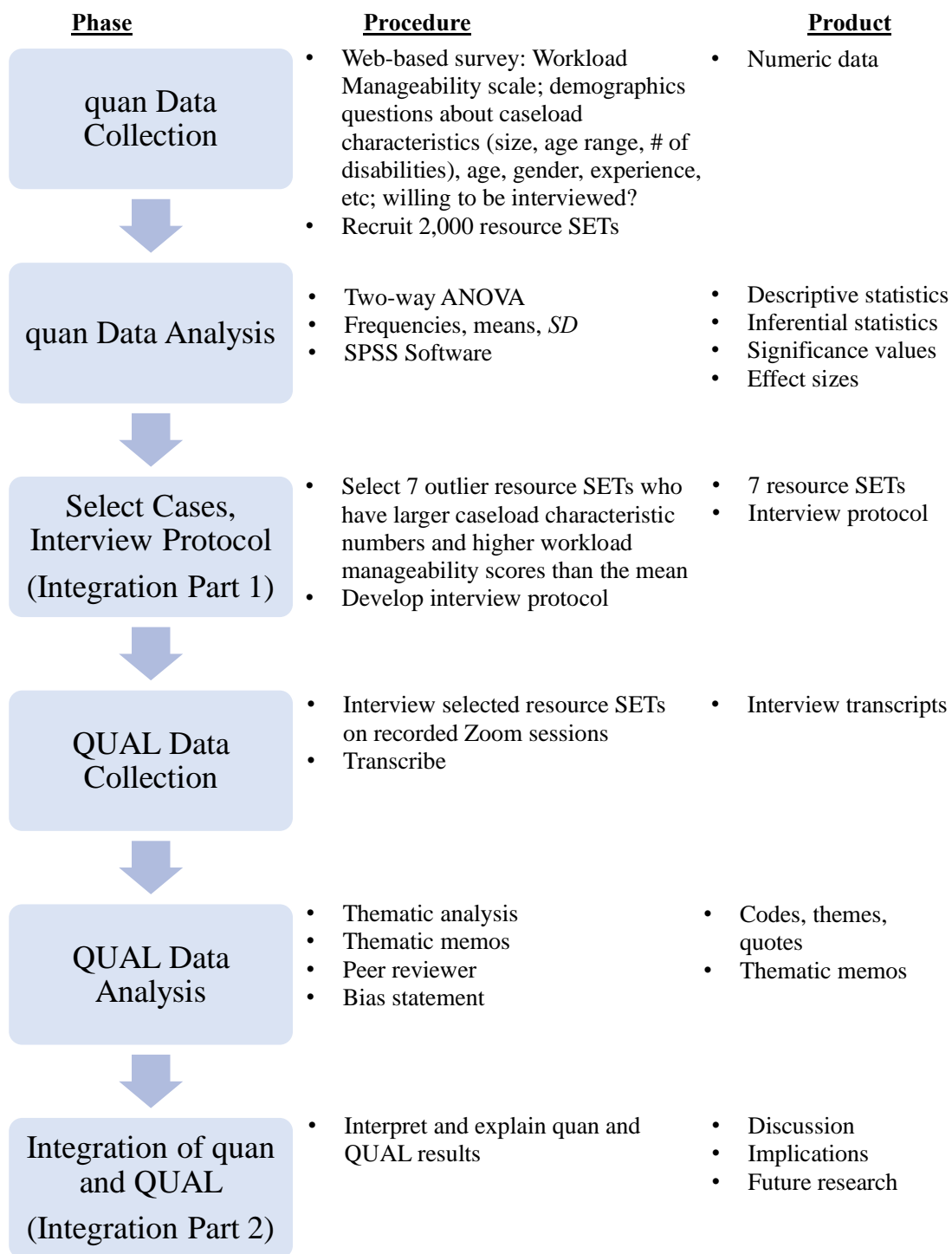
There is a need to understand the connection between SET caseload size and perceived workload manageability and to explain the outlier SETs who both have large caseloads and perceive their workloads to be manageable.

The quantitative data were collected through a survey with closed-ended questions and an invitation to participate in interviews. The integration occurred in the middle of the study, when the collection and analysis of the quantitative data informed the qualitative phase. Outlier SETs who both have large caseloads and perceive their workloads to be manageable were recruited to participate in interviews. The qualitative data were analyzed and integrated with the quantitative data for stronger conclusions.

In mixed methods designs, researchers decide whether the quantitative or qualitative phase of the study has priority (i.e., weighting or importance), or if both phases have equal status (Creswell & Creswell, 2018; Creswell & Plano Clark, 2018). In this study, the qualitative data had priority because the intention was to explain the quantitative outliers with qualitative data. While the quantitative data provided interesting results, the qualitative data revealed resources for caseload management that could positively impact the field of special education.

Figure 3 shows a procedural diagram of the study's procedures. A procedural diagram is a visual display of how and when each research activity occurs (Creswell & Creswell, 2018; Creswell & Plano Clark, 2018; Plano Clark & Ivankova, 2016).

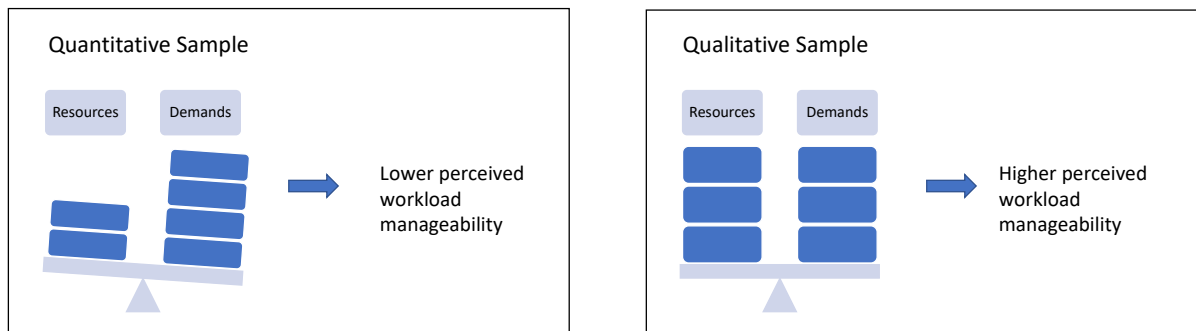
Figure 3

Procedural Diagram of Explanatory Design Study

Role of Theoretical Framework

COR theory was the theoretical framework that guided this study. COR theory suggests that workers use resources to meet the demands of their jobs, and the demands and resources must be balanced for workers to be satisfied with their jobs (Alarcon, 2011). When a worker's demands outweigh resources, the balance is upset, leading to stress (Hobfoll, 1989). The application of COR theory for the SETs in the quantitative phase of this study was that the increased job demands of large caseloads would lead to decreased perceived workload manageability, as shown on the left side of Figure 4. This application of COR theory informed the development of the second quantitative research question, which asked of differences in perceived workload manageability among participants with small or large caseloads and one to six or seven or more disabilities on their caseloads. The assumption was that large caseloads with several disabilities increased SETs' job demands so much that their perceived workload manageability was negatively impacted. This assumption was based on literature describing large and unmanageable caseloads as exhausting (Ansley et al., 2016; Billingsley, 2011), challenging (Berry & Gravelle, 2013; Dinnebeil et al., 2019; Hagaman & Casey, 2018; Lashley & Boscardin, 2003), overwhelming (Brownell et al., 2002; Eisenman et al., 2011; Miller et al., 1999; Moody et al., 2000), and frustrating (Brownell et al., 1997).

Figure 4

Application of COR Theory for Explanatory Design Study

For the qualitative phase of the study, shown on the right side of Figure 4, the application of COR theory was that outlier participants from the quantitative phase who had higher perceived workload manageability than the mean had other resources (e.g., time, energy, support) that allow them to balance the job demands of a large caseload. COR theory informed participant selection for the qualitative phase, as participants who had larger caseloads than the mean and higher perceived workload manageability than the mean were selected.

In COR theory, there are four types of resources that help workers adapt to their job environment: objects, conditions, personal characteristics, and energies (Alvaro et al., 2010; Salanova et al., 2010). Alvaro et al. (2010) described objects as physical items (e.g., clothing), conditions as structures (e.g., good health), personal characteristics as traits or skills, and energies as resources “whose value is derived from their ability to be exchanged for other resources” (p. 3). This definition of resources informed the qualitative research question, which asked about the resources that the participants used to manage their large caseloads. The definition of resources also informed the interview

protocol. Questions from a previous study (Hogue, 2020) were revised to include tools (i.e., objects), conditions, and personal characteristics that supported caseload management. In the qualitative data analysis, the codes were analyzed to understand the types of resources the participants used. The two themes identified in the data were organization and support structures. Although no object or energy resources were found in the data, organization was a key personal characteristic resource discussed by the participants. Support structures were conditions that the participants relied on to manage the demands of their caseloads.

Sample

In the quantitative phase of this study, 2,000 SETs were recruited to participate in a closed-ended survey with demographics questions and workload manageability questions. After the data were collected and analyzed, seven resource SETs were recruited for interviews about caseload management.

Context

Resource SETs in Oregon were recruited to participate in this study. This study used the term resource SET to describe an SET who works with students with disabilities who spend the majority of their day in the general education setting. A resource SET may teach specialized skills to students with disabilities and may also co-teach in the general education classroom to a mix of students with and without disabilities. This is different from a self-contained SET, which describes a teacher of students with disabilities who spend most of their day in the special education classroom. It is common to study the issues of SETs in self-contained settings separate from other SETs (e.g., Albrecht et al., 2009; Bettini et al., 2020; O'Brien et al., 2019). Additionally, many states with caseload

policies specify the classroom setting (e.g., resource, self-contained) or the percentage of time the students spend in special education (Hogue & Taylor, 2020).

Resource SETs in Oregon were recruited for this study because Oregon is a state without any policies regarding caseload size, and resource SETs tend to have the largest caseloads in special education (Hogue & Taylor, 2020). The expectation was that by conducting this study in a state without caseload policies and with resource SETs who tend to have larger caseloads than self-contained SETs, the participants would have a broader range of students on their caseloads than if different SETs in a different state were recruited.

Sampling

On March 31, 2021, the researcher submitted a public records request to the Oregon Department of Education, seeking the email list of currently certified SETs in the state. On April 2, 2021, the researcher received a spreadsheet with 9,327 entries including the name, email address, type of license, and license expiration date. The licensure types on the spreadsheet were special education, special education: generalist, special education: communication disorders, special education: visually impaired, special education: deaf and hard of hearing, early intervention, and legacy special education. The researcher sought responses from SETs who are currently working in a special education resource capacity, so only SETs with the generalist license, legacy special education license, or special education license ($N = 7,939$) were included. In the 2020-2021 school year, there were 3,838 SETs working in Oregon (R. Clark, personal communication, December 13, 2021). The contact list included teachers with special education licensure who have moved out of state, are not currently teaching, or who are teaching in other

settings, such as general education. SETs in self-contained settings in Oregon also use a generalist license, so the population list included SETs in self-contained settings.

Because these factors led to a low response rate, random sampling was used to randomly select 2,000 participants. In random sampling, every member of a population has an equal and independent chance of being selected (Mertens, 2015). The participants were asked to complete an online survey that included demographic questions and a workload manageability survey. The final question asked participants if they were willing to be interviewed. Of the 2,000 invited participants, 334 responded to the survey: eight did not provide consent, 17 did not finish the survey, 106 said that they were not currently teaching, 58 were teaching in a self-contained setting, 26 said the setting was not currently listed, and 119 were currently teaching special education resource.

Table 4 describes the demographics of the 119 resource SET participants from the quantitative phase. The participants' gender, school setting (e.g., elementary school), community setting (e.g., rural), age range, and years of experience are presented.

Table 4

Participant Demographics from the Quantitative Phase

Category	Sub-Category	<i>N</i>
Gender	Male	24
	Female	95
School Setting	Elementary School	44
	Middle School	28
	High School	35
	Did not respond	12
Community Setting	Rural	41
	Urban	35
	Suburban	43

Category	Sub-Category	<i>N</i>
Age Range	20 to 25 years	0
	26 to 30 years	10
	31 to 35 years	10
	36 to 40 years	12
	41 to 45 years	17
	46 to 50 years	23
	51 to 55 years	17
	56 to 60 years	15
	61 to 65 years	12
	66+ years	3
Years of Experience	0 to 5 years	26
	6 to 10 years	32
	11 to 15 years	17
	16 to 20 years	22
	21 to 25 years	13
	26 to 30 years	3
	31+ years	6

In addition to the information presented in Table 4, caseload data were collected. The participants were asked about the total number of students on their caseloads, the number of different disabilities represented on their caseloads, and the age range of students on their caseloads. The age range question asked participants of the difference in ages between the oldest and youngest students on their caseload. For example, if there were nine-year-olds, 10-year-olds, and 11-year-olds on the caseload, the age range was two. The mean caseload size was 30.3 students ($SD = 11.2$), and the size ranged from four to 58 students. The mean number of disabilities on the caseload was 6.8 ($SD = 2.0$) and the mean age range of students on the caseload was 5.8 ($SD = 2.9$). Finally, workload manageability scores were collected. The mean workload manageability score was 2.3 ($SD = 0.8$).

For the qualitative phase, nested sampling was used to select seven participants

from the quantitative phase who were willing to be interviewed. In nested sampling, a small number of participants from one phase of the study are a subset of participants from the other phase of the study (Creswell & Plano Clark, 2018; Mertens, 2015). To encourage participation, a \$25 gift card was offered to each of the seven selected participants who consented to be interviewed. These seven participants were outliers in the quantitative data who have larger caseloads than the mean and greater perceived workload manageability than the mean. Table 5 describes the demographics of the qualitative participants.

Table 5

Participant Demographics from the Qualitative Phase

Pseudonym	Gender	Age	Years of Experience	School Setting	Workload Manageability Score	Caseload Size
Janet	F	51-55	6-10	Rural HS	2.5	31
Ben	M	31-35	0-5	Suburban HS	2.75	58
Sue	F	51-55	16-20	Rural HS	3.0	39
David	M	31-35	0-5	Rural MS	5.0	40
Phoebe	F	46-50	16-20	Urban MS	3.25	40
Cara	F	46-50	6-10	Rural HS	2.5	32
Tony	M	51-55	16-20	Suburban HS	2.5	40

Data Collection

In this explanatory sequential design study, quantitative data were collected and

analyzed, which informed the collection and analysis of qualitative data.

Instrumentation

The measure for the quantitative phase of this explanatory sequential design study was the Workload Manageability scale. Recently, the scale was used by Bettini et al. (2017, 2018) in studies comparing novice SETs and novice general education teachers (GETs), using data collected in the Michigan Indiana Early Career Teacher Study (MIECT). The MIECT study was led by Dr. Peter Youngs of Michigan State University from 2006-2009; the project was funded by the Carnegie Corporation (Bettini et al., 2017). The MIECT study examined the experiences of novice teachers in 10 Michigan and Indiana school districts (c.f., Jones & Youngs, 2012; Jones et al., 2013; Kim et al., 2017; Pogodzinski et al., 2013; Pogodzinski et al., 2012; Qian et al., 2013; Youngs et al., 2011). The Workload Manageability scale was part of a larger survey created from existing surveys (e.g., Bryk & Schneider, 2002; Penuel et al., 2009) for the MIECT.

Through two-way repeated measures ANOVAs, Bettini et al. (2017) used the Workload Manageability scale to look for differences between novice SETs and novice GETs. Then, the researchers conducted structural equation modeling to compare fall workload manageability to spring emotional exhaustion and career intentions for both groups. The workload manageability items were combined into an exogenous variable. The researchers confirmed the predictive validity of the Workload Manageability scale for the outcomes of emotional exhaustion and intent to continue teaching. Bettini et al. (2018) used confirmatory factor analysis to turn the items from the larger scale into the constructs of workload manageability, collective responsibility, and instructional interactions with mentors and colleagues. The researchers found adequate model fit and

reliability for SETs and GETs. Then, the researchers used structural equation modeling to test structural models to understand whether SETs' perceptions of social resources predicted workload manageability (Bettini et al., 2018). Bettini et al. (2018) reported that the Workload Manageability scale had good model fit and reliability for novice SETs and GETs.

The researcher was given permission to use the Workload Manageability scale, a free scale (E. Bettini, personal communication, September 14, 2021). The Workload Manageability scale has four five-point Likert questions. (See Appendix A). The lowest possible response is strongly disagree and is coded as 1, and the highest possible response is strongly agree. Strongly agree is coded as 5. Three items on the scale are worded positively, where higher scores mean higher perceived workload manageability. One item is worded in a negative manner (i.e., "I feel I'm working too hard on my job.") For the negatively worded item, higher scores mean lower perceived workload manageability. After data collection was completed, the responses to the negatively worded item were reversed so that a higher response indicated higher workload manageability.

The measure for the qualitative phase of this study was semi-structured interviews. See Appendix B for the interview protocol for the current study. The first five questions were general demographics questions, asking about the participants' current caseload numbers, the disabilities that students have on their caseloads, the number of years they have been teaching, their current schedules, and how much preparation time they have built into their current schedules. The next seven questions were the semi-structured interview questions.

In a study of the lived experiences of five secondary resource SETs, Hogue

(2020) developed an interview protocol to understand how secondary SETs managed their caseloads. Hogue (2020) asked questions about the components of managing a caseload, how the participants managed their caseloads, the strategies the participants used to manage their caseloads, and the challenges involved in managing caseloads. The purpose of Hogue's (2020) study was to develop a preliminary understanding of the methods SETs used to manage their caseloads. In the current study, Hogue's (2020) interview protocol was revised to address the definition of resources from Salanova et al. (2010). Using COR theory, Salanova et al. (2010) described four types of resources that people use to adapt to their environments: objects, conditions, personal characteristics, and energies. For example, resource SETs may describe objects such as an intuitive IEP software program or a binder used to keep records organized. Conditions may be collegial support, secretarial support, or caseloads organized by the district in a certain way that makes them more manageable. Personal characteristics may be certain skills or beliefs that the participants have that make them more likely to perceive their workload as manageable. Energies may be resources such as time or bonuses for caseloads that exceed a certain number. Table 6 shows the semi-structured interview questions and the resources from COR theory that are embedded into the questions.

Table 6

Types of Resources in the Interview Protocol

Resource(s)	Question
Conditions, energies	1. How does your school/district determine each teacher's caseload?
Objects, personal characteristics, conditions, energies	2. What are the components that go into managing a caseload?
Personal characteristics, energies	3. What strategies help you feel successful in managing your caseload?
Objects	4. What tools have you developed/gotten from others that help you manage your caseload?
Conditions	5. Are there any conditions that help you manage your caseload? (Things that your administrator or district office does, ways the caseload is organized, etc).
Personal characteristics	6. What personality traits does a good case manager have?
Objects, personal characteristics, conditions, energies	7. Other thoughts/ideas related to case management?

Procedures

In this explanatory sequential design study, 119 resource SETs were recruited to take a survey with closed-ended questions during the quantitative phase, and 7 resource SETs participated in interviews in the qualitative phase. After committee and IRB approval, the survey was sent to 1,000 potential participants via email with a survey link. After three reminder emails, only 53 participants met the inclusion criteria, so the survey was sent to an additional 1,000 potential participants. The email introduced the study. Per IRB, the first question of the survey described the study and provided an opportunity for informed participant consent. Participation in the study was described as completely

voluntary, and the participants were told they could stop at any time. Declining to participate in the study or stopping participation would not have any negative effects on their careers. If the participants marked “yes,” they consented to participate in the survey. If the participants marked “no,” they were thanked for their time and the survey discontinued. The survey contained demographics questions and the Workload Manageability scale. Because the contact list provided by the Oregon Department of Education contained emails of currently licensed SETs rather than currently employed SETs, the first question asked whether the participant was currently employed as an SET in a traditional public school in Oregon. If the participant marked “no,” they were thanked for their time and the survey discontinued. If they marked “yes,” they continued the survey. The demographics questions asked the participants their age, gender, years of experience, type of special education teaching (e.g., primarily self-contained or primarily resource), the number of students on their caseload, the age range of students on their caseload, the number of disabilities on their caseload, school setting (e.g., elementary, middle, high school), and whether they currently teach in an urban, suburban, or rural district. Then, the participant completed the four Likert questions of the Workload Manageability scale. The last question asked whether the participant was willing to be interviewed. The participants interested in interviews ($n = 66$) provided their email addresses.

Following the analysis of the quantitative data, the participant pool was narrowed to 11 resource SETs who were willing to be interviewed, had larger caseloads than the mean, and had higher workload manageability than the mean. An email was sent to the 11 potential participants, asking if they were still interested in being interviewed. After a

follow-up email, seven resource SETs agreed to be interviewed. Because the intent of qualitative research is to explore rather than generalize knowledge, a small sample of seven participants is permissible (Rossman & Rallis, 2017). The interviews were held on Zoom. First, the researcher explained the study to the participant and asked them to provide consent. They were told that nonparticipation would not impact their careers. The participants signed a consent form via MS Word and emailed the form back to the researcher. Each participant agreed that their interview could be recorded on Zoom for transcription purposes. The media file was saved to the researcher's computer rather than the cloud. The researcher used the semi-structured interview protocol to interview each participant. After each interview, Zoom generated a transcript, although the transcripts were inaccurate. The researcher listened to each interview, revising the Zoom-generated transcript. Next, the researcher listened to each interview a second time, reviewing the transcripts for accuracy. After each interview was transcribed, the Zoom recording and transcript were uploaded to NevadaBox, a secure server, and the video and transcript were immediately deleted from the researcher's computer.

Data Analysis

In this explanatory sequential design, quantitative data were collected and analyzed. The data analysis informed participant selection for the qualitative phase of the study. Although the quantitative phase was first, the qualitative phase had priority.

Quantitative Analysis

For the quantitative data in this study, several analyses were conducted using SPSS software. First, descriptive statistics were used to analyze the resource SETs' demographic data. The nominal data (i.e., gender, level of education, current teaching

position, current school setting, urban/rural/suburban) were described with frequencies, and the ratio data (i.e., age, years of experience, the number of students on their caseload, the number of disability categories present on their caseload, the age range of students on their caseload) were described with means and standard deviations. Additionally, means and standard deviations were calculated for the participants' responses to the Workload Manageability scale.

The first research question asked about the caseload characteristics (i.e., size, age range, number of disabilities) of the participants in the study, specifically the caseload characteristics of elementary, middle, and high school resource SETs and rural, urban, and suburban resource SETs. Descriptive statistics were used to answer this research question. Means and standard deviations were used to describe the size, age range, and number of disabilities on the caseloads for elementary, middle, and high school resource SETs. To answer the second sub-question of the first research question, means and standard deviations were also used to describe the size, age range, and number of disabilities on the caseloads for rural, urban, and suburban resource SETs.

The second research question asked if there were differences in perceived workload manageability among resource SETs with varying caseloads characteristics. The first sub-question of this research question asked about differences in perceived workload manageability between resource SETs with small and large caseloads. The second sub-question asked about differences in perceived workload manageability between resource SETs with one to six and seven or more disabilities on the caseload. The third sub-question asked about differences in perceived workload manageability between resource SETs with small and large caseloads who have one to six or seven or

more disabilities on their caseloads. Inferential statistics were used to answer the second research question, specifically a two-way ANOVA. A two-way ANOVA was used to analyze differences between groups on two independent variables (i.e., caseload size, number of disabilities on caseload) and one dependent variable (i.e., workload manageability score; Salkind, 2007). Table 7 shows the variables in the two-way ANOVA analysis. Each independent variable had two levels: caseload size (small, large) and number of disabilities on the caseload (one to six, seven or more). The dependent variable was perceived workload manageability.

Table 7

Variables in the Two-Way ANOVA Analysis to Answer Research Question Two

	Caseload size below the mean	Caseload size above the mean
1-6 Disabilities on Caseload	a	b
7+ Disabilities on Caseload	c	d

The null hypotheses were that there were no differences among caseload size, no difference among number of disabilities on the caseload, and no interaction between caseload size and number of disabilities on the caseload. The assumptions of a two-way ANOVA are random samples, normal population, homogeneity of variances, independent data, and that the data is interval or ratio (Salkind, 2007). Levene's Test of Equality of Error Variances was nonsignificant, so homogeneity of variances was assumed (Johnson & Christensen, 2017). Next, the tests of between-subjects effects showed whether the F value was significant at the .05 level (Salkind, 2007; Sprinthall, 2012). An F value

significant at the .05 level rejects the null hypothesis and indicates that differences exist (Johnson & Christensen, 2017). This test also showed the effect sizes of the test (Sprinthall, 2012).

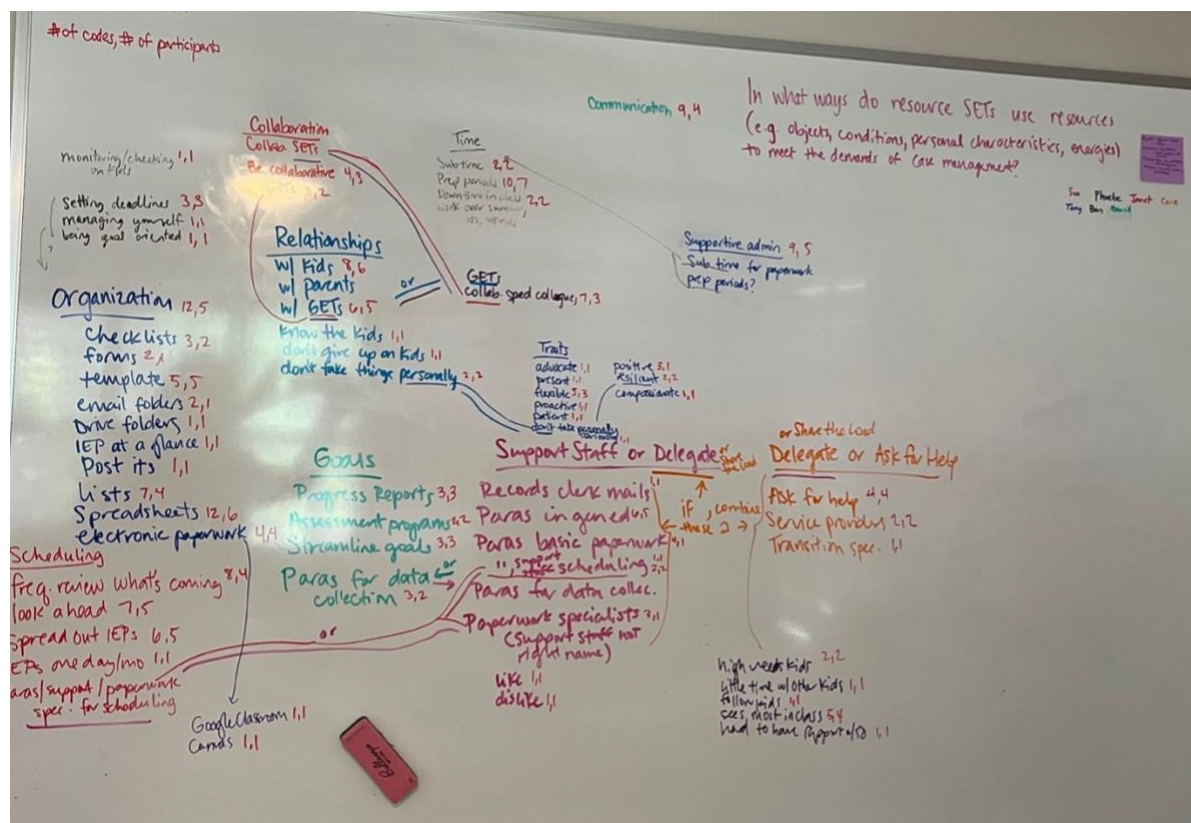
Qualitative Analysis

The qualitative data, interview transcripts, were analyzed with a constructivist approach. The participants constructed meaning about the same experiences in different ways. For example, several participants discussed the importance of support staff, but some preferred to use support staff for paperwork and others preferred that support staff work directly with students. Another way that constructivism guided the data analysis was that there were multiple stages of coding (Thornberg & Charmaz, 2014), specifically constant comparison analysis (Lewis-Beck et al., 2004). Constant comparison analysis is a data analysis strategy where the researcher continually interacted with the data and the codes to develop themes (Johnson & Christenson, 2017). First, the researcher took brief notes during each interview. After all the transcripts were transcribed, the researcher wrote thematic memos, writing bullet points as she read each transcript. She did this in three rounds, varying the order that she read the transcripts in each round. The data were read three times (Given, 2008) because it is important to familiarize oneself with the data (Rossman & Rallis, 2017). In the next thematic memo entry, the researcher reviewed the qualitative research question and wrote initial thoughts about possible codes. Next, the data were coded through open coding, where the researcher examines and names specific elements in the data (Johnson & Christenson, 2017). The researcher reread each transcript, writing codes on notecards, using a designated color for each participant. This step was repeated with each transcript to check for missing codes. Next, the codes were

written on a whiteboard so that the researcher could identify commonalities in the data. See Figure 5 for a picture of the whiteboard during this process. On the whiteboard next to each code, the researcher wrote the number of quotations and number of participants for each code to ensure that the final themes accurately represented the whole group.

Figure 5

The Researcher's Whiteboard before Codes Were Collapsed into Themes



The researcher wrote thematic memo entries to identify her thoughts about potential themes. She also reread articles about COR theory to make sure she understood the theory's definition of resources. Following the work on the whiteboard and reflection in the thematic memos, the researcher collapsed codes into themes (Johnson & Christenson, 2017). For example, the codes of spreadsheets (12 quotations, 6

participants) and lists (7 quotations, 4 participants) were collapsed into the sub-theme of organizational strategies.

The last coding step was selective coding, where the researcher finalized the themes (Johnson & Christenson, 2017) after a final thematic memo entry. Throughout the process, the themes were revised as necessary until the results were narrowed to the major themes, organization and support structures, and the sub-themes of strategies, scheduling, administrative support, support staff, and collegial support. Thematic memo writing throughout the analysis process provided a deeper understanding of participants' experiences with their caseloads and workload manageability (Given, 2008; Rossman & Rallis, 2017).

Integration

Data integration, or the mixing of quantitative and qualitative data, is a crucial component of MM research (Anderson, 2018; Brannen & O'Connell, 2015; Collins, 2015; Creamer, 2018; Creswell, 2015; Creswell & Creswell, 2018; Creswell & Plano Clark, 2018; Johnson & Onwuegbuzie, 2004; Klingner & Boardman, 2011; Maxwell et al., 2015; Mertens, 2015; Onwuegbuzie & Johnson, 2006; Plano Clark & Ivankova, 2016; Tashakkori et al., 2015). Integration can give researchers more confidence in results and conclusions (McKim, 2017). A rigorous MM study needs adequate data to be able to integrate both the quantitative and qualitative analyses (Collins, 2015).

The goal of the integration in this explanatory sequential design study was explanation (Creswell, 2015; Creswell & Creswell, 2018; Klingner & Boardman, 2011; Plano Clark & Ivankova, 2016). The integration occurred in the middle of the study when the analysis of the quantitative data informed the development of the qualitative phase

(Creswell & Creswell, 2018; Creswell & Plano Clark, 2018; Plano Clark & Ivankova, 2016). The integration impacted sampling decisions in the qualitative phase (Creswell & Creswell, 2018). Outlier resource SETs who both have larger caseloads than the mean and higher perceived workload manageability than the mean were recruited to participate in interviews.

The data were also integrated following the qualitative phase of the study through side-by-side comparison of the quantitative and qualitative results (Creswell & Creswell, 2018; Creswell & Plano Clark, 2018). These comparisons were shown through a joint-display table, which is a table or figure that visually represents both quantitative and qualitative data together as a method of integration (Creswell, 2015; Johnson & Christenson, 2017). A joint display table allows side-by-side comparisons of both sets of results (Creswell & Plano Clark, 2018). In this way, the merged results expanded on each piece of data.

Reliability/Credibility

Reliability and credibility describe the consistency of the responses in the data (Creswell & Plano Clark, 2018; DeCuir-Gunby & Schutz, 2017). To address reliability for the quantitative measure, Cronbach's alpha was conducted on the survey. Cronbach's alpha is a measure that determines the degree that items are interrelated (Johnson & Christenson, 2017) and which items contribute to overall reliability (Sprinthall, 2012). The four Workload Manageability scale items had a composite Cronbach's alpha of 0.676. In scales with fewer than ten items, it is difficult to obtain a high alpha; an alpha greater than 0.5 is considered sufficient to show reliability on scales with fewer than ten items (Pallant, 2020). Additionally, the fact that the Workload Manageability scale has

been used in studies of SET working conditions (Bettini et al., 2017, 2018) contributes to the study's reliability. For credibility in the qualitative measures, the data were coded at least twice to capture all the important findings (Rossman & Rallis, 2017). Thick, rich descriptions were used to describe the findings (Brantlinger et al., 2005; Creswell & Creswell, 2018). For example, in the results section, the researcher included the fact that one of the participants laughed when describing a strategy for managing her caseload. In text, the researcher explained that the participant laughed because she was acknowledging that she had already spoken several times about this strategy. The researcher wrote thematic memos (Rossman & Rallis, 2017), and enlisted the support of a peer reviewer to code a subset of the qualitative data to ensure credibility (Brantlinger et al., 2005; Creswell & Creswell, 2018; Rossman & Rallis, 2017). The peer reviewer framed her review by connecting quotations from the transcripts to the concept of resources from COR theory; the reviewer told the researcher that she agreed with the finalized themes. Additionally, the researcher wrote a statement about her role as the researcher, including her bias (see Appendix C; Creswell & Creswell, 2018) as a former special education resource teacher in Oregon.

Validity/Trustworthiness

Validity and trustworthiness are the level of quality in MM studies, including each phase, its conclusions, and its applications (Onwuegbuzie & Johnson, 2006). To address validity and trustworthiness, MM researchers must use the appropriate quantitative data collection and analysis procedures for the quantitative data and the appropriate qualitative procedures for the qualitative data (Greene, 2007; Johnson & Christenson, 2017). In explanatory sequential designs, researchers may have invalid

results if they do not consider all the options for follow-up in the qualitative phase, as they may overlook important information (Creswell & Creswell, 2018). To address this, researchers must consider all options before selecting variables of study in the qualitative phase (Creswell & Creswell, 2018). Resource SETs who have large caseloads and high perceived workload manageability were interviewed because it was assumed that they had the resources necessary to manage their caseloads. Another potential threat to validity is using participants from different samples, because the participants in the qualitative phase would not have participated in the quantitative phase (Creswell & Creswell, 2018). To address this, a small group of participants from the quantitative sample were selected for the qualitative phase (Creswell & Creswell, 2018).

In this study, the quantitative measure was the Workload Manageability scale, which is an established scale that has been used in two studies (Bettini et al., 2017, 2018), and the questions from the scale have been used in larger surveys in several studies (e.g., Bryk & Schneider, 2002; Jones & Youngs, 2012; Jones et al., 2013; Kim et al., 2017; Penuel et al., 2009; Pogodzinski et al., 2013; Pogodzinski et al., 2012; Qian et al., 2013; Youngs et al., 2011). Trustworthiness in the qualitative data was addressed through thick descriptions and thematic memos (Given, 2008; Rossman & Rallis, 2017).

Ethical Considerations

There are ethical considerations in this study. The first ethical consideration is informed consent (Rossman & Rallis, 2017); the study was described to participants before each phase, and they had the opportunity to decline consent. Nonparticipation did not impact their careers. Another consideration is that the participants were offered gift cards to in the qualitative phase. This is an ethical consideration because it could be

considered coercive. A third consideration is researcher bias. The researcher is a former Oregon resource SET and came to this study with personal experiences with managing a large caseload. The researcher perceived that a large caseload made her workload less manageable. To address this, the researcher purposely selected participants for the qualitative phase who have large caseloads and perceive their workload to be manageable, because these SETs have learned how to manage large caseloads in a way that she did not.

Summary

The purpose of this MM explanatory sequential study was to examine the lived experiences of resource SETs employed in Oregon for the 2021-2022 school year who both have large caseloads and perceive that their workloads are manageable. In this proposed study, 2,000 SETs were recruited to participate in a survey. Data from resource SET participants were analyzed for this study. The survey had demographics questions, including questions about caseload characteristics, as well as items from the Workload Manageability scale. Next, the quantitative data were analyzed through descriptive and inferential statistics to understand differences in the data set. The assumption was that resource SETs with larger caseloads and more disabilities on their caseloads would have lower perceived workload manageability than resource SETs with smaller caseloads or fewer disabilities on their caseloads. Next, outlier resource SETs with larger caseloads than the mean and higher perceived workload manageability than the mean were recruited to participate in interviews. Guided by COR theory, the goal of the interviews was to understand the resources that resource SETs use to manage their caseloads. Following analysis of the qualitative data, the quantitative and qualitative results were

integrated for stronger conclusions.

Chapter 4: Results

Large and unmanageable caseloads are a working condition that can have a negative impact on the special education teacher (SET) workforce. Researchers have recommended that districts hire additional SETs to reduce caseload sizes, yet there is a longstanding shortage that makes this recommendation difficult. To address this problem, this mixed methods explanatory design study surveyed resource SETs in Oregon about their caseloads and their perceptions of their workload manageability. In the second phase of the study, participants were recruited who had higher perceived workload manageability than the mean and larger caseloads than the mean, so that they could share the resources that helped them manage their caseloads.

This chapter will follow the format of the study: first, the results of the quantitative phase will be presented. Second, the first part of the mixed methods integration will be described, where the qualitative participants were selected from the quantitative sample. Third, the qualitative results will be discussed, and fourth, the second part of the mixed methods integration will be described.

Quantitative Research Questions: Questions One and Two

The first quantitative research question asked about the caseload characteristics of the participants in the study, specifically the size, age range, and number of disabilities on the caseloads of elementary, middle, and high school resource SETs and rural, urban, and suburban SETs. The second quantitative research question asked if there were differences in perceived workload manageability among resource SETs with small and large caseloads, resource SETs with one to six or seven or more disabilities on their caseloads, and whether there was interaction between the caseload variables.

Research Question One: Caseload Characteristics

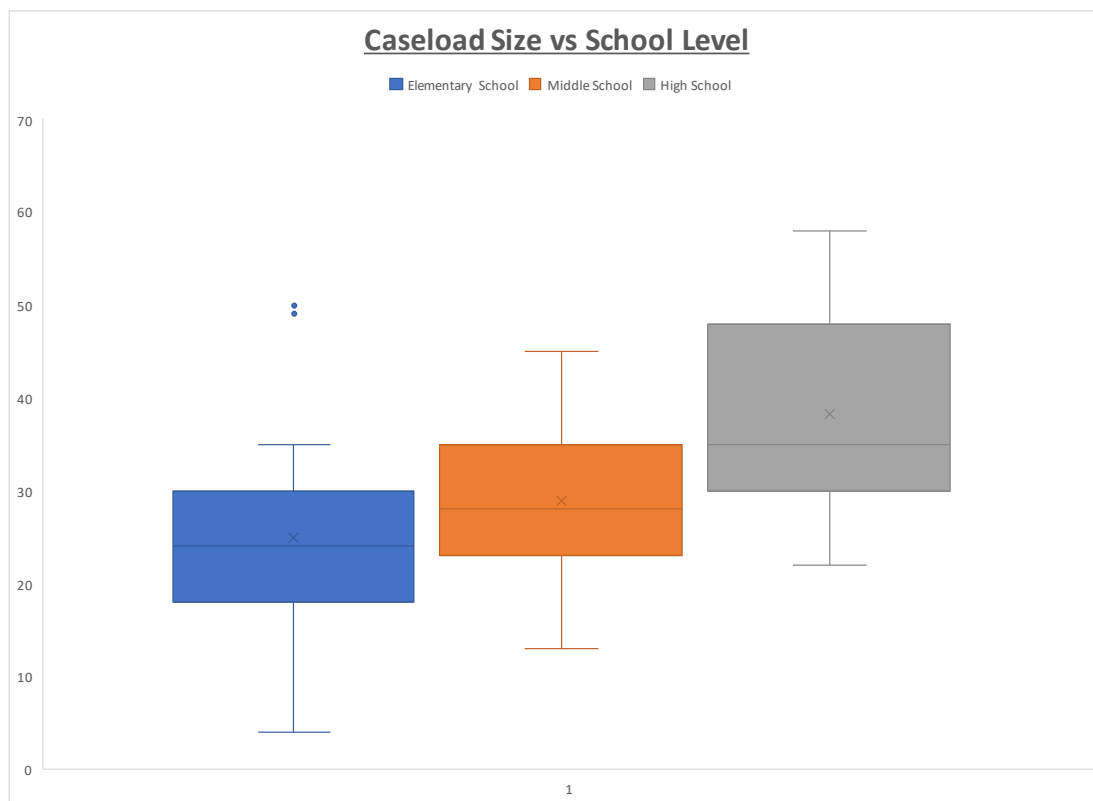
1. *What are the caseload characteristics of the participants in this study?*

Specifically:

- a. *What are the caseload characteristics (size, age range, number of disabilities) of elementary, middle, and high school resource SETs in this study?*
- b. *What are the caseload characteristics (size, age range, number of disabilities) of rural, urban, and suburban resource SETs in this study?*

Descriptive statistics were used to address the question about caseload characteristics among participants in the study ($N = 119$).

Figure 6

Caseload Size of Elementary, Middle, and High School Resource SET Participants

There were 44 elementary resource SETs, 28 middle school resource SETs, and 35 high school resource SETs who participated in the quantitative phase of the study. Twelve participants did not respond to the question about school setting. The distribution of caseload size among elementary, middle, and high school resource SETs is shown in Figure 6. Elementary resource SETs had the smallest mean caseloads and high school resource SETs had the largest. Table 8 shows the means and standard deviations for the caseload size, number of disabilities on the caseload, and age range on the caseload for elementary, middle, and high school resource SETs in the sample. The number of disabilities on the caseloads for each type of resource SET were similar. The question

about the age range of students on the caseload asked participants to report the difference between the oldest and youngest students on their caseloads. Middle school resource SETs had the smallest age range on their caseloads of 4.5 years between the oldest and youngest students on their caseloads, followed by elementary school resource SETs, and high school resource SETs had the largest age range.

Table 8

Caseload Characteristics of Elementary, Middle, and High School Resource SET

Participants

	Elementary School	Middle School	High School
	<i>M</i> (<i>SD</i>)	<i>M</i> (<i>SD</i>)	<i>M</i> (<i>SD</i>)
Caseload size	24.9 (9.3)	28.9 (8.5)	38.3 (10.5)
Number of disabilities on caseload	6.8 (2.1)	6.5 (1.7)	6.9 (2.1)
Age range on caseload	5.8 (1.9)	4.5 (3.4)	7.0 (3.1)

Note. $N = 119$.

There were 41 rural, 35 urban, and 43 suburban resource SETs who participated in the quantitative phase. Figure 7 shows the distribution of the participants' caseload size.

Figure 7

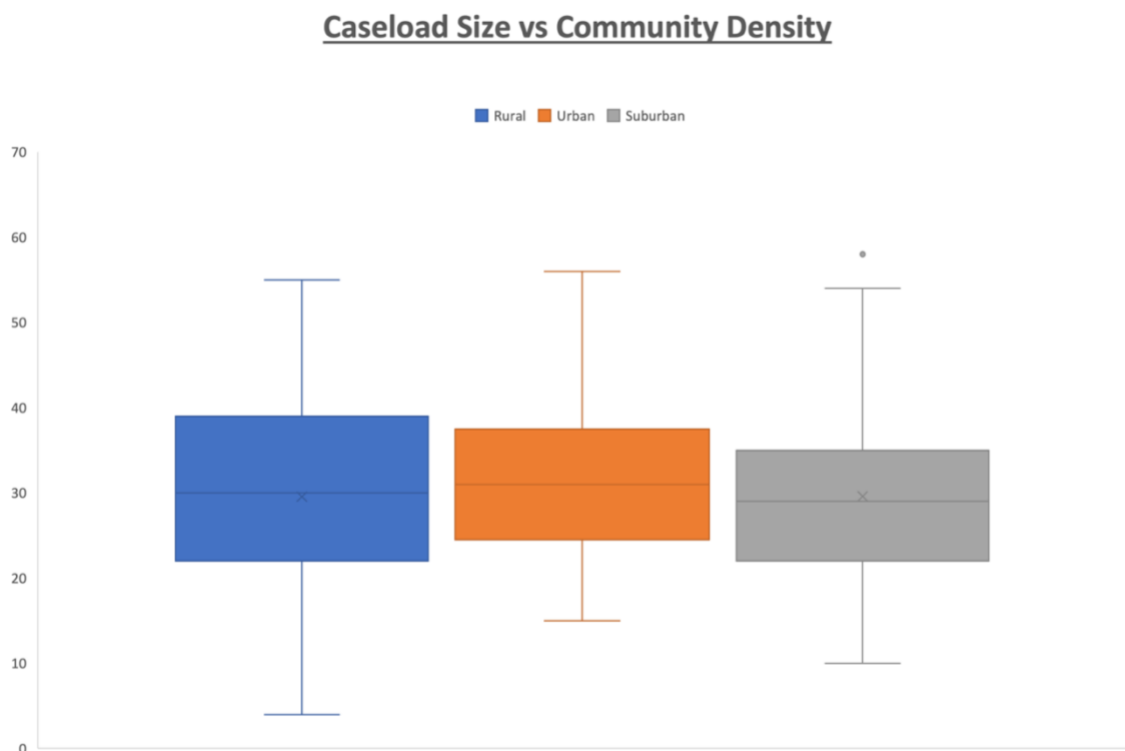
Caseload Size of Rural, Urban, and Suburban Resource SET Participants

Table 9 shows the caseload characteristics of rural, urban, and suburban resource SETs in the sample. Urban resource SETs' caseloads were slightly larger than rural and suburban caseloads. The number of disabilities on caseloads was similar across groups, similar to the sample mean. The age range of students on rural resource SETs' caseloads was larger than the age range on urban and suburban resource SETs. There was an average 7.1 year age difference between the oldest student on rural resource SETs' caseloads and the youngest.

Table 9

Caseload Characteristics of Rural, Urban, and Suburban Resource SET Participants

	Rural <i>M</i> (<i>SD</i>)	Urban <i>M</i> (<i>SD</i>)	Suburban <i>M</i> (<i>SD</i>)
Caseload size	29.6 (12.1)	31.1 (10.8)	29.6 (11.7)
Number of disabilities on caseload	6.2 (1.6)	7.1 (2.5)	7.1 (1.6)
Age range on caseload	7.1 (2.9)	5.1 (2.8)	5.2 (2.5)

Note. *N* = 119.

Research Question Two: Perceived Workload Manageability and Caseload***Characteristics***

2. *Are there differences in perceived workload manageability among resource SETs with varying caseload characteristics? Specifically:*
 - a. *Is there a difference in perceived workload manageability between resource SETs with small and large caseloads?*
 - b. *Is there a difference in perceived workload manageability between resource SETs with one to six disabilities on their caseload and resource SETs with seven or more disabilities on their caseload?*
 - c. *Is there a difference in perceived workload manageability between resource SETs with small and large caseloads who have one to six or seven or more disabilities on their caseload?*

A two-way ANOVA was conducted to address the question of differences in workload manageability among resource SETs with small and large caseloads with one to

six or seven or more disabilities on their caseloads. The dependent variable was workload manageability, measured by a composite score of the four Likert questions on the Workload Manageability scale. The independent variables were: (a) caseload size with two levels (small, large), and (b) number disabilities on caseloads with two levels (one to six, seven or more). Table 10 shows the variables in the two-way ANOVA.

Table 10

Workload Manageability Composite Mean Scores for the Four Groups in the Two-Way ANOVA Analysis to Answer Research Question Two

	Caseload size below the mean	Caseload size above the mean
1-6 Disabilities on Caseload	2.52 (0.82)	2.7 (0.7)
7+ Disabilities on Caseload	2.22 (0.79)	1.96 (0.81)

There were three null hypotheses: no difference among those with small or large caseloads; no difference among those with one to six or seven or more disabilities; no interaction between caseload size and number of disabilities. To answer the research question, the data was subjected to a completely randomized, factorial, 2X2 ANOVA on workload manageability scores, caseload size by number of disabilities. Table 11 shows the results of the 2X2 ANOVA. Homogeneity of variance was assumed as the results Levene's Test of Equality of Error Variances (0.302) were not significant ($p = 0.824$).

Table 11

Effects of Caseload Size and Number of Disabilities on Workload Manageability

	Source of Variance					
	Sum of Squares	df	Mean Squares	F	Sig.	Partial Eta Squared
Caseload	0.038	1	0.038	0.060	0.806	0.001
Number of Disabilities	7.648	1	7.648	12.069	<0.001	0.096
Caseload*Number of Disabilities	1.294	1	1.294	2.041	0.156	0.018
Within Groups	72.237	114	0.634			
Total	81.117	117				

As Table 11 shows, the effects of caseload size on workload manageability scores were not significant, but the effects of number of disabilities on workload manageability scores were significant at less than 0.001. However, these effects were small. There was no significant interaction between caseload size and number of disabilities on workload manageability scores.

Mixed Methods Integration Part One

The first round of integration in this mixed methods explanatory design study occurred following the quantitative data collection. In the quantitative phase, the mean caseload size was 30.3 ($SD = 11.2$) and the mean workload manageability score was 2.3 ($SD = 0.8$). Of the 119 participants, 66 indicated they would be willing to participate in follow up interviews about caseload management. However, only 11 potential participants had caseloads larger than 30 and workload manageability scores higher than 2.3. Of these people, seven agreed to participate in interviews. The caseload sizes among

the qualitative participants ranged from 31 to 58, and the workload manageability scores ranged from 2.5 to 5.0. The seven participants in the qualitative phase were outliers in that they both had large caseloads and high perceived workload manageability. The goal of the qualitative phase was to understand the resources these participants used to manage their caseloads.

Qualitative Research Question: Question Three

3. *In what ways do resource SETs with large caseloads and high perceived workload manageability use resources (e.g., objects, conditions, personal characteristics, and/or energies; Salanova et al., 2010) to meet the demands of case management?*

After analyzing the data from interviews with seven resource SETs, two themes and five subthemes were identified. Organization was a personal characteristic resource that SETs used to manage their caseload; subthemes were strategies and scheduling. Support structures was a condition resource with the subthemes of administrative support, support staff, and collegial support. No object or energy resources were identified in the data.

Organization

Organization was a frequently discussed personal characteristic. The participants described the importance of organization and provided their strategies and topics related to scheduling. One key focus for organization was keeping on top of deadlines for students' IEPs. Cara said she did not want to "miss things" and Phoebe added that she had missed a few meetings in her career when she was not organized. Phoebe described managing a caseload as managing herself. "If I wait until the last minute to do

everything, that's an issue." Janet said, "For me, managing is really about making sure I'm crossing my t's and dotting my i's." David described the importance of finding the organizational system that works for him and being goal oriented. For example, David said, "A long-term goal could be getting an IEP written or getting testing done. A short-term goal could be getting the evaluation consent form signed. You need to be able to be extremely organized." Janet added that it was important to be "very organized with how you keep your files and how you keep information relevant to that particular student's growth and goals."

In addition to mentioning the word, "organization," the participants shared their specific organizational strategies that they used for caseload management.

Strategies. Some of the strategies the participants mentioned were spreadsheets, templates, lists, and electronic systems.

Five of the participants regularly used spreadsheets as an organizational strategy to manage their caseloads. Ben, Janet, and Phoebe used spreadsheets to keep track of various IEP due dates. Ben said, "There's this master sheet that I use. It breaks it down by month, IEPs and reevals. And so, I like that, as a visual." Because Ben has over 50 students on his caseload, he relies on the spreadsheet to keep track of meeting due dates. Janet created a similar spreadsheet with disability categories, IEP due dates, reevaluation due dates, and required personnel. "All those things, I review frequently. I look at that probably four or five times a week, just to make sure that I'm where I need to be." Janet explained that this spreadsheet is an organizational system that expedites the planning process for her caseload. Phoebe used the tab function on the spreadsheet to organize the IEP due dates for her caseload and to prepare for the following school year.

In October I had three 6th graders that are going to become 7th graders, so [the paraeducator is] adding the new date, she adds the new level, and by the end of the year then I should have this caseload per month updated for the next school year.

Phoebe found this spreadsheet helpful because she keeps her students until they graduate from the middle school. This way, she has her spreadsheet started for the following school year and will only need to add new 6th graders and transfer students.

In addition to using spreadsheets for due dates, Cara and Sue used spreadsheets to track the specially designed instruction (SDI) of their students and Phoebe tracked goal progress. Cara noted what each student was working on and who would be seeing them. Sue found tracking SDI helpful for sharing information with parents. “I can say, ‘Hey we've offered your kid services every single day, and this is what your kid is saying, and we keep trying, but we can't beat him over the head with a wet noodle.’” Sue considered this practice data tracking. Similarly, Phoebe used spreadsheets to keep track of goal progress. “I'll have M for math, W for writing, R for reading, S for social, B for behavior and then I have a column for speech that I mark...Each kid has so many goals and I really need that visual.” Because these participants have a larger caseload than the average participant from the quantitative phase, they relied on spreadsheets to track data and manage IEP due dates.

Another frequently mentioned organizational strategy was templates. Tony, Cara, Janet, David, and Ben each mentioned using templates in some way. By using a template, David said, “I can knock out an IEP and have it be specific to the student and their progress.” Cara described her template as a “cheat sheet,” “where I just copy and paste

certain things in there, so it's consistent and it sounds intelligent.” Janet called this practice “banking statements” or using “canned items,” which helps with “expediting the paperwork side of it.” The participants explained that these templates save valuable time and ensure that the wording is consistent on IEPs.

In addition to templates for IEP paperwork, Ben and Cara used templates for goals. Ben said, “Having three or four goals saved in a Google document, some solid goals, is really helpful. I know my kids so when I have a meeting coming up, I know where their goal should be reaching for.” Similarly, Cara received advice from a more senior resource teacher at another high school on “consolidating goals, so that I don't have 500 different types of goals.” Cara explained that she has general algebra, writing, and reading goals for students. “I think that's helped instead of having 30 times 4 goals for each kid. I inherited somebody else's goals when I first started, and I was like, ‘Oh my gosh, I can't make rhyme or reason to any of this.’” The participants still ensured that each IEP goal was individualized to each student; having sample goals for each content area saved time so that the participants could find an appropriate goal for that student’s level.

Another common organizational strategy was lists. Janet, Phoebe, Sue, David, and Tony each mentioned lists several times. David said he has a “running list of things I need to do,” and Tony read off his to do list for that day. “I usually have about two months on my desk, so I’m not surprised by anything.” Sue explained that she reviews and rewrites her lists often because “the repetition helps.” She also keeps lists specific to other caseload management tasks. “I make a testing list--who's due when. When certified letters have to go out. When [notice of transfer of rights] letters have to get out. I try to

organize everything I can before school starts.” David used detailed lists to track specific pieces of paperwork, such as the need to follow up with a general education teacher before the meeting. “If I’m waiting for a [testing] protocol from a teacher, it can be pretty easy to just overlook it and forget it. By the time you get to the meeting, you don’t have all the stuff you need.” The participants used lists to manage the various pieces of paperwork required for meetings and for communication with parents and staff.

Phoebe created a detailed checklist with checkboxes for questions such as, “Did I send [the teachers] the form? Did I get it back and did I print it? State and district assessment, PLEP, goals--did I write them in there?” Phoebe also created a checklist that, “mimics the team meeting notice. When I mark down, is it a 3 year [reevaluation]?... And then on this side it has who to invite. Do I need the interpreter? The school psych? The speech path? I have yes/no on there to add them or not add them.” These checklists are more specific lists that Phoebe can reuse. The checklists helped Phoebe manage her caseload and helped her communicate with her paraeducators so that they could support her in managing her caseload.

David, Sue, Janet, and Tony each mentioned electronic organizational resources. David’s district uses an online site “that has a bunch of really good information or prior written notice templates and stuff like that, but that’s helpful. That makes it easier to find stuff without having to ask someone.” Similarly, Tony’s and Sue’s districts used the same online IEP platform to track IEP information. Each mentioned the portfolio option in the program. Tony said, “It has all the dates and everything from [the program], so we always have this to keep us on track... We just try to keep our head above water.” Sue said, “It gives us a heads up that way as far as not missing things.” Janet added that

online IEP programs helped reduce time spent on paperwork. “I think that that legwork of not having to go to a photocopier and make copies and make sure they're in the proper order and all these things, where human error could interfere with that.” Electronic organizational resources helped the participants manage IEP paperwork and stick to deadlines.

Spreadsheets, templates, lists, and electronic organizational resources were organizational strategies the participants used to manage their caseloads. Another organizational component frequently mentioned was IEP scheduling.

Scheduling. The SETs’ used their organizational skills to schedule meetings in a way that supports them managing their caseloads. David and Sue each mentioned the importance of looking ahead to upcoming IEP due dates and meetings. David said it was important to be “ahead of your deadlines. Understanding your deadlines and how long you have to complete something. Now it looks different for every person, but, for example, all of my IEPs are already scheduled for the rest of the year.” Similarly, Sue said, “I try to look at least a couple months out. In November, I was scheduling through February. Now that we've been back [from winter break], I'm scheduling through April.” By scheduling meetings far in advance, the participants knew when they need to prepare IEP paperwork and they know which weeks will be busy with meetings. David added that he liked to schedule meetings before their due dates in the event that parents needed to cancel, or some other issue arose.

Sue, Janet, and Cara each spread out their IEP meetings so that they did not have times in the school year with many more IEP meetings than other times in the year. To accomplish this, they would purposely schedule some meetings well in advance of the

yearly due date. For example, Janet said,

A great example is November. We have fewer school days and so that makes it more challenging to get those in. A lot of times, I'll try to space things out so that I have maybe a maximum of two meetings a week, if possible.

Similarly, Sue said, "I try not to over schedule IEPs if I can help it. I try to keep them to one a week through my busy schedule." Cara also attempted to spread out her IEP meetings. "I've taken my caseload this year and I spread it out through the months. I was really heavy in May, and I just pulled a bunch up [to April]." By looking ahead to schedule IEPs, the participants tried to schedule meetings so that their time was balanced. This was an important organizational practice that the participants used frequently. However, this practice was not always possible due to factors outside the SETs' control. Janet explained, "So far, I think I've held seven IEPs this month. And I have a couple more that are that are just following right now, but then I won't have hardly any meetings until probably April." Although the participants attempted to spread out their IEPs, sometimes required personnel such as parents, administrators, or general education teachers were not available at a convenient time for the resource SETs, or snow days or school holidays made scheduling more difficult.

Another organizational method for scheduling was dividing caseloads so that no SET was overscheduled with IEP meetings in one month. Phoebe said that she and her colleague "sat down at the end of the year with the remaining kids that would be 7th and 8th just to make sure that somebody doesn't have 12 IEPs in October." This method was another way to spread out IEP due dates. Spreading out IEP due dates meant that the work involved in preparing for, running, and wrapping up IEP meetings was steadier.

Tony's and Cara's districts handled IEP meetings in different ways than the rest of the participants. Tony's district office had designated IEP specialists who scheduled the meetings and wrote most of the paperwork. Tony provided this person with data to fill out the paperwork, and he attended the IEPs for his students and took notes. The district created a calendar so that the SETs knew when the meetings were scheduled. Tony said, "You can anticipate this week in March, you're going to have Joey, Sally, and Tommy." Tony liked this practice because he could prepare for each meeting ahead of time. Cara's district, on the other hand, liked its SETs to schedule IEP meetings one day per month because there was only one school psychologist for the district. Cara described what she liked and disliked about this practice.

I really like it because I'm focused. I'm like, 'Okay, I got to get these reports done. I'm going to do this. I know they're due this week.' It's not like, 'Oh God, I've got another one, I've got another one.' It gives me some space after they're done. It's this huge relief. I've got two weeks where I can chill out a little bit, focus on other stuff. And it's more consistent for the teachers. They always know it's the first Wednesday of every month, so if they have something going on and they get a sub, which is also great. The cons are that you're doing a lot of IEPs on one day and sometimes it's a lot of paperwork.

Holding IEPs one day per month was feasible in Cara's district because it is small. It was interesting because she liked to spread out her IEPs so that each month was somewhat balanced, but each month those IEPs were held on the same day.

Organization was a personal characteristic that helped the participants manage their caseloads, particularly through IEP scheduling and organizational strategies.

Support structures was a condition that helped caseload management.

Support Structures

The support structures that the participants discussed were administrative support, support staff, and collegial support.

Administrative Support. Six of the participants explained that supportive administrators helped them manage their caseloads. Sue, Cara, and Tony each appreciated that their administrators would let them do their jobs, without too much interference. Sue said, “I feel 100% fortunate with my administration, because they give me plenty of latitude.” Cara added that she likes her district administrator for special education. “She's also not a micromanager. She'll ask what I need. She'll come in and say hi, but she won't linger. She won't tell me how to do things unless I ask so I appreciate that about her.” Tony said, “Our admin team is pretty hands off. They're not super helpful per se but they're not overly involved in the details of our life so that's nice.” Because the administrators did not interfere, the participants felt like professionals and felt they had the latitude to do their jobs effectively.

Another way that administrators supported the participants was by providing occasional substitute days as needed. Phoebe said, “If we're like, ‘Oh my gosh, I have 5 IEPs I have to finish in a month’ or whatever, he's pretty good at trying to get us coverage.” Similarly, Sue said,

If I feel like I'm struggling with testing or paperwork or something like that, then I go in to my principal and say, ‘Hey, I'm going to hole up in the office and start doing whatever I need to do so I'm going to have so and so cover my classes.’

Sue explained that this administrative support helped her manage the duties involved in

caseload management. She also said that it was important to ask for help when she needed it, because the substitute days helped her stay on track, and she would not have had substitute days if she did not ask.

Another way that the participants' administrators were supportive was by not adding on additional duties. Sue said, "They don't expect me to take on extra stuff. They'll ask if I want to do something. If I say, 'I really don't think I can,' then they'll go, 'Yeah, no problem.'" Similarly, Ben said that his administrators were supportive when they asked him to take on an additional class. They asked, "Is this something you'd want to do? ...It's always in the spirit of, 'How can we help you do your job?'" Rather than mandating additional work, these administrators understood that the resource SETs would take on these tasks if they could. This made the participants feel supported and heard.

Cara and Sue each had administrators that would listen to what the resource SETs needed. Cara said, "She's a great listener...She really hears what you actually need. She's not going to just go get you whatever but she will provide you with the tools you need." Sue said, "My building administrator is 100%, 'You're the professional, you tell me what you need, and I'll make sure it happens' type guy. I'm completely supported there and so that helps." The participants felt supported by administrators who treated them as professionals, listened to what they needed, and tried to fill those needs as best they could.

Support Staff. Each participant discussed how support staff helped them manage their caseloads. Cara, Janet, and Phoebe delegated some basic paperwork tasks to paraeducators or other support staff. Cara's district had a records clerk who "does the

printing and the attendance. I just send her stuff and she deals with it and prints off and sends it to the families so that I don't have to. That's nice." Janet said, "I will have a parapro fill out those clerical kinds of things," referring to inputting students' IEP information into the online system. She added that she wished she could use more of the paraeducator's time for "the minutiae side of it. Because I feel like I would serve the student better if I was focusing more on the aspects of what that data means, how it intersects with their learning in the classroom." Although Cara and Janet liked using support staff for some paperwork tasks, they each wished they could delegate more to their paraeducators. Phoebe, however, was able to delegate much more work to her paraeducator.

I train an assistant to do basic paperwork. And I've been through several of them already but they're capable of calling the parents and scheduling a time. They're capable of doing the team meeting notice. They make my meetings for me on the Google document, the platform, Google Meet. They invite the teachers.

Phoebe learned about using support staff for basic paperwork in her first district, which had a designated secretary who filled out some of the IEP paperwork and scheduled meetings. Phoebe said, "I don't necessarily as the paid expensive teacher have to input certain things or do certain things when it's okay if an aide calls home to schedule a meeting." She added, "I've trained my aide [laughs] to go in and fill out those basic ones that don't require a lot of training or whatever else. Which then really enables me to do the meat—the goals, the accommodations, present level page." Phoebe laughed when she said that she trained her aide because she had already spoken several times about how she used support staff to help her with different aspects of caseload management. By training

support staff to do clerical tasks, Phoebe had more time and mental energy to work with students and to write the more detailed sections of the paperwork.

Like Phoebe, Ben and Tony also had support staff who would schedule IEP meetings. Ben said,

[The support staff person] schedules our meetings and she does all the reaching out and stuff. That's been super helpful...If school districts were able to do that, man, that makes a big difference, because then case managers don't have to call home and try to get the notice of team meetings and stuff going.

Tony's district handled meetings differently, with designated district office staff who scheduled meetings and wrote some of the paperwork. "We're just basically told, on Thursdays and Fridays, those are IEP meeting days. You just get the invite." Because Ben and Tony have large caseloads, they appreciated that they did not have to contact parents, administrators' assistants, and general education teachers find a meeting time that worked for each participant.

While several participants liked using paraeducator support for paperwork and scheduling, David and Sue expressed concerns over the best way to use this resource. Sue said, "My job's the paperwork, unfortunately, and managing resources, and getting to be with the kids when they're with me, but I want the aide with the kids to help them be supported in classes." Similarly, David did not think that it would be helpful to use paraeducator support for paperwork and scheduling.

If they were doing my scheduling for me, they don't know everything that I have going on. I think that'd make it harder for me actually if they did scheduling and I had to try and I remember when they scheduled it for me.

Although there was not consensus among the participants about using paraeducator support for paperwork, several participants used paraeducator support to ensure the students on their caseloads received their SDI. Cara and David each decided that it was more valuable for the students if the paraeducators were in the general education setting with the students for some of their SDI. Phoebe sent one paraeducator to the general education setting and one paraeducator stayed in her room. In Phoebe's room, "kids are working on different things sometimes and our 6th grade kids are in there by themselves, but 7th and 8th are mixed. But even 7th and 8th, skills are all over the place." Tony also liked sending paraeducators to the general education setting because they could share information on the student's progress. He gave an example of what the paraeducator might say: "Okay, Sally's failing [a general education teacher's class]. She won't accept my help, blah blah blah. Can you touch base with her parents?"

Another way that the participants used support staff was for data tracking. Sue's paraeducator suggested that they use a shared spreadsheet to track data for each student. Sue said, "Every day, [the paraeducators] can go in and just do a little bit of data tracking each period they have that kid." Phoebe also used paraeducators for data tracking, particularly for goal progress. "One-minute readings, asking for comprehension, how many words, we do little math assessment things. She'll go around during that time if there's not a lot going on, and she'll pull our kids out for assessment." Phoebe also trained the paraeducator to input the data into the online IEP system, which streamlined the work Phoebe must do when progress reports are due.

Collegial Support. The third type of support structure was collegial support, specifically related service providers, general education teachers, and other SETs.

Several participants mentioned collegial support from related service providers, such as the transition specialist in Cara's district. Cara said, "We're doing a lot of those skills that the kids need for graduation and for job skills like resume writing or practice writing essays to apply for scholarships for trade school." Cara explained that she enjoyed collaborating with this colleague and that she felt it provided a more well-rounded educational experience for her students. Janet added that she appreciated the responsiveness of the speech and language pathologist (SLP) and autism consultant in her district, and Phoebe liked that the SLP in her district implemented weekly lessons with all the students with disabilities at the school, not just the students with speech needs.

Ben and David each focused on the importance of asking for help from IEP team members and colleagues. Ben described how he and his SET colleagues supported each other by collaborating and doing tasks for colleagues when needed. Ben said, "During one of those times when I got really busy, another case manager was able to step in and do a pre-planning meeting for me because I had too many meetings. And that was super super helpful." Ben added, "It's important to be able to ask for help and to know that you can delegate things to trusted team members." David described asking for help in more detail. He called this, "using your resources" and "realizing that it's not just you." "If you're going to be testing a kid with autism, reach out to the autism specialist. Reach out to the speech and language pathologist. Get their feedback, get their advice. Don't try to do everything yourself." As the participants explained, it is not only important to ask for help from colleagues, but it is important to use the resources that different colleagues can offer.

The participants also appreciated having supportive relationships with other SETs.

Janet said that she and her SET colleagues communicated frequently and shared information with each other, such as data they may have on each other's students.

We'll talk about strategies for working with our kids that have behavior plans.

We'll often staff a few kids, what's happening with this student or that student.

Determine what's a good fit or a better fit for where they are in their class

schedule. Maybe there's some nuances that one or the other teachers aren't aware of.

Janet added, "It's especially profound when you know that you can count on that other teacher like, 'Hey I know information that might help you and so here you go.'" The SET colleagues also shared information about students who were struggling. Ben said that his colleague worked with some of the students on Ben's caseload and let him know if a student was having a difficult time managing behavior or completing assignments. "And that puts them back on my radar because I hate to say it, when you have a big caseload, you really can't help but focus on the kids that are causing the most noise." Frequent communication and collaboration with colleagues were especially important for those with large caseloads.

In addition to sharing information, Phoebe liked to share the workload with her resource SET colleague. When the SLP implemented her weekly lesson with Phoebe's and her colleague's classes, Phoebe and her SET colleague alternated supporting the SLP and using the time for paperwork. Phoebe and her SET colleague also shared lessons and planned activities. "That has been helpful so that we're providing support for all of what the kids need." Phoebe and her colleague maximized their time for paperwork and collaborated frequently to support students.

The participants also appreciated collegial general education teachers. Phoebe and Ben emphasized the importance of communication with the general education teachers. Phoebe liked that the general education teachers at her school communicated about students' needs.

I have a lot of teachers that will email me or put a test in my box and say, 'Here's the kids that need it.' We just work on it the next day or two. That way the kids are getting the test read if they need it, or they can come to my room and sit there quietly with their notes or whatever accommodations they have on the IEP.

Teachers are pretty good about letting me know that that's coming up.

Similarly, Ben said, "I feel really comfortable reaching out by email or stopping by their classroom or visiting them during prep and just checking in and making sure they don't need anything from me." Sue liked that the general education teachers she worked with responded quickly and provided feedback. She felt that she and the general education teachers were part of the same team. Sue explained, "It makes it easy to be positive about my high needs caseload because I have so much support in the building...It's not just my kids/their kids. We all wrap around these kids and do what we need to help." The participants liked working with general education teachers who communicated well and were eager to support students with disabilities.

Collegial support, support staff, and administrative support were support structures in place at the participants' schools that helped them manage their caseloads. Organization was another key to case management for these outlier participants who had larger caseloads and higher perceived workload manageability than the mean quantitative sample.

Mixed Methods Integration Part Two: Research Question Four

4. *In what ways do interviews with resource SETs about managing their caseloads help to explain the perceived manageability of their workloads?*

The qualitative participants were interviewed to understand why they had higher workload manageability scores than the average quantitative phase participant, despite the workload of a large caseload. Table 12 shows a joint display of sample qualitative responses that explained the differences in workload manageability between the qualitative participants and the larger quantitative sample. Each item from the Workload Manageability scale is listed in the first column of the table, followed by the mean from the quantitative sample ($N = 119$) and the mean from the qualitative sample ($n = 7$). Next, quotations from the interviews show why the qualitative sample had more positive scores on the Workload Manageability scale than those in the quantitative phase.

Table 12

Joint Display of Sample Qualitative Responses Explaining Quantitative Differences in Workload Manageability

Workload Manageability Item	Quan Sample <i>M</i> (<i>SD</i>)	Qual Sample <i>M</i> (<i>SD</i>)	Quotation from Interview
1. I am teaching with adequate resources and materials to do my job properly.	2.7 (1.3)	3.1 (1.5)	<p>“[The learning management system] is a helpful platform... You just put in the kid’s name, Taylor Whatever, view all their grades. You can click on their class and see their assignments, and then you can actually go deeper in because we’re administrators on that system. We have that view. I can open up one of Johnny’s papers and actually look at his paper, look at the teacher feedback, so that’s helpful.” - Tony</p> <p>“We just got [assessment software], so I really rely on that for the reading and the math. I just get better data that way. Because the high school goals can be all over the place. Then I also made [an electronic] form that I send to teachers. And it just asks them all about their goals and stuff like that, and so that information makes it a little bit easier, streamlined for me to write their present levels and stuff.” - Cara</p>
2. My workload is manageable.	2.4 (1.2)	3.6 (1.0)	<p>“Usually for me, the week before school starts, I can feel my anxiety go up because I’m getting ready. I’m readying myself mentally and physically for what I know is going to be initial chaos. Because every school year starts like that. You have 10 days to get those newbies in your setting, all dealt with and in order, and then you start to get in your routine and things start to kind of flow. And then, by midyear you’re like, I could do this in my sleep and it’s not a big deal.” - Janet</p> <p>“I have a prep period first thing in the morning, so that covers everything. Then at the end of the day, I have a testing period. I can do testing when I need to. I can do observations. I can work with kids--whatever has to happen. I have co-taught in the</p>

Workload Manageability Item	Quan Sample <i>M</i> (SD)	Qual Sample <i>M</i> (SD)	Quotation from Interview
3. I feel I'm working too hard on my job. (Reverse scored)	3.7 (1.1)	3.3 (1.1)	<p data-bbox="877 347 1940 412">past but for whatever reason, it's worked out better that I was back in the classroom offering those services back in my classroom." - Sue</p> <p data-bbox="877 451 1982 672">"[In my previous district], let me tell you, I was berserk, and I felt like a chicken with my head cut off having more kids and more responsibilities and less time to do it because my prep was often taken by meetings. In this district, it's just been amazing. Forty is the most kids I've ever had and then I have two preps and they're very good about making sure--I talked to our sped director earlier this week and she's like, 'Well, you're getting those, right?'" - Phoebe</p> <p data-bbox="877 711 1982 932">"Being able to set some boundaries for yourself is super super important. There's probably going to be situations where you just can't get around it, but for the most part, if you just say I'm at work and I'm focusing on work from this time until this time and then afterwards, I'm with my family. I'm focused on my health. I'm doing whatever. I think it's important. That's something that's really easy to overlook when you're first getting into it." - Ben</p>
4. Administrative duties/paperwork do not interfere with my teaching.	1.8 (1.1)	2.9 (1.5)	<p data-bbox="877 971 1982 1143">"Realize where your strengths are. They used to do team teaching. Some teachers would rather be in the classroom all the time. Some teachers would rather do the background data collection and research and stuff. I like teaching but I'm a total data nerd. If I had a choice, I'd rather just do the IEPs, the data collecting and all that stuff." - David</p> <p data-bbox="877 1185 1982 1253">"I have so much support that it's not just me sitting in a room running these IEPs and being overwhelmed by kids, parents, and staff members." - Sue</p>

As Table 12 shows, the merged quantitative and qualitative results expanded on the data. The participants in the qualitative phase had personal characteristics (i.e., organization) and conditions (i.e., support structures) that enabled them to manage the demands of large caseloads. For example, Cara and Tony each described technological programs that helped them manage their caseloads. These programs were adequate resources that allowed the participants to do their jobs properly (i.e., Item 1). Janet's quotation showed how she found her workload manageable (i.e., Item 2) after she endured the hectic times at the beginning of the school year. Sue's preparation periods made her workload manageable. Phoebe described the difference between her previous school district, where she had more students on her caseload and less time to prepare for meetings and instruction. In her current district, she did not feel like she was working too hard on her job (i.e., Item 3) because her preparation periods were protected, and she did not have more than 40 students on her caseload. Ben did not feel he was working too hard at his job because he set boundaries for himself to keep work and his home life separate. Although the qualitative participants had larger caseloads and therefore more paperwork than the average participant from the quantitative phase, they did not feel that administrative duties and paperwork interfered with their teaching (i.e., Item 4). The merged results of the quantitative and qualitative phases illustrated the differences in qualitative group, as compared to the larger quantitative sample.

Summary

This mixed methods explanatory study sought to understand the lived experiences of Oregon resource SETs with large caseloads who perceived their workloads to be manageable. In the first, quantitative phase, 119 resource SETs in Oregon completed an

online survey with workload manageability questions and questions about their caseloads. At the beginning of the chapter, caseload characteristics (i.e., size, age range on the caseload, number of disabilities on the caseload) were described for elementary, middle, and high school resource SETs in the sample and for rural, urban, and suburban resource SETs in the sample. There was a significant difference in perceived workload manageability for those with more than seven disabilities on their caseload than those with fewer than seven disabilities on the caseload. In the qualitative phase, participants with larger caseloads than the mean and higher perceived workload manageability than the mean were interviewed to understand the resources they used to manage their caseloads. These resources were organization, with the sub-themes of strategies and scheduling, and support structures, with the sub-themes of administrative support, support staff, and collegial support. In the final phase of the study, the results of the quantitative and qualitative phases were integrated to illustrate why they were able to manage their heavy workloads.

Chapter 5: Discussion

Special education is in a longstanding crisis because of the difficulty finding and retaining special education teachers (SETs). Many factors contribute to the instability of the SET workforce, making it a complex issue. Some of the factors influencing the SET shortage are working conditions, such as administrative support, school climate, and professional development. Working conditions have been studied using the construct of workload manageability. SET caseloads are another working condition, which have been described as exhausting, stressful, and concerning. Researchers have recommended that districts hire additional SETs to lower the size of caseloads, yet the SET shortage makes this recommendation unfeasible. This mixed methods explanatory study used conservation of resources (COR) theory to understand the resources SETs use to manage their caseloads.

Findings

In the quantitative phase of this study, resource SETs in Oregon completed a survey with workload manageability questions and questions about their caseloads. Next, in the qualitative phase of this study, participants with larger caseloads than the mean and higher perceived workload manageability than the mean were interviewed. Finally, the results of the quantitative and qualitative phases were integrated.

Quantitative Research Findings

In the quantitative phase of this study, 119 resource SETs completed an online survey with workload manageability questions and questions about their caseloads. Each participant was a resource SET in Oregon, a state that does not have any policies about caseload size (Hogue & Taylor, 2020). The caseload policies in other states are varied,

with a highest possible number of students per caseload ranging from 15 students in Minnesota to 50 students in North Carolina and Pennsylvania. The SETs in this data set had a range of four students to 58 students on their caseloads. The mean caseload size was 30.3 ($SD = 11.2$), the mean number of disabilities on the caseload was 6.8 ($SD = 2.0$), and the mean age range of students on the caseload was 5.8 ($SD = 2.9$). The Workload Manageability scale contained four five-point Likert questions. The mean workload manageability score was 2.3 ($SD = 0.8$).

Research Question One: Caseload Characteristics. The first research question asked about the caseload characteristics (i.e., size, age range, number of disabilities on the caseload) of elementary, middle, and high school resource SETs and of rural, urban, and suburban resource SETs. Caseload sizes varied among elementary ($M = 24.8$, $SD = 9.3$), middle ($M = 28.9$, $SD = 8.5$), and high school ($M = 38.3$, $SD = 10.5$) resource SETs in the sample. It is unclear why high school resource SETs in the sample had larger caseloads, and there is not any explanation in the literature. Regardless, the mean caseload sizes for each group were much larger than the recommended caseload sizes in the literature of 15 students (Williams & Dikes, 2015) or 17 students (Brozovich & Kotting, 1984). High school resource SETs also had larger caseloads than Idol's (1988) recommendation of 35 students.

The average number of disabilities on the caseload for elementary, middle, and high school resource SETs was more consistent across groups, with the means for each group falling between six and seven. The average participant had more disabilities on their caseload than the number of disabilities that made some SETs want to leave their jobs in one study (i.e., four; Carlson et al., 2002a).

High school resource SETs had a broader age range of students on their caseloads ($M = 7.0$, $SD = 3.1$) than elementary ($M = 5.8$, $SD = 1.9$) and middle school ($M = 4.5$, $SD = 3.4$) resource SETs. One explanation for the broader age range of students for high school resource SETs could be that special education services are offered to students in Oregon until they graduate high school or turn 21 (Oregon Department of Education, 2020). A high school resource SET could have a 14-year-old freshman and a 21-year-old student who has not graduated yet on the same caseload.

The caseload characteristics of rural, urban, and suburban resource SETs appeared similar. The average caseload size was slightly higher among urban resource SETs ($M = 31.1$, $SD = 10.8$) than the average of 29.6 for both rural ($SD = 12.1$) and suburban ($SD = 11.7$) resource SETs. The average caseload size in a rural district was much larger than the mean caseload size found in Berry and Gravelle's (2013) national sample of 203 SETs in rural districts (i.e., 15.2 students, $SD = 8.0$). It could be that rural districts in other states have smaller caseloads because the states have caseload policies, which may have lowered the average caseload size in Berry and Gravelle's (2013) sample. In this study, the average number of disabilities on the caseload for each group was six to seven, and the average age range for each group was five to seven years. These means appear similar to the means of the elementary, middle, and high school resource SETs.

Research Question Two: Perceived Workload Manageability and Caseload Characteristics. The second research question asked if there were differences in perceived workload manageability among resource SETs with small or large caseloads and one to six or seven or more disabilities on their caseloads. There were no differences in perceived workload manageability among resource SETs with small (i.e., fewer than or

equal to 30 students) or large (i.e., greater than or equal to 31 students) caseloads. This result is surprising because large caseloads were a reason SETs left their jobs in some studies (Billingsley & Cross, 1991; Brownell et al., 1997; Plash & Piotrowski, 2006) and a reason some SETs were considering leaving their jobs (Berry, 2012; Hagaman & Casey, 2018; Kaff, 2004). Large caseloads also contributed to burnout in one study (Williams & Dikes, 2015) and were a source of stress for SETs in other studies (Fimian et al., 1986; Fimian & Santoro, 1983; Haydon et al., 2018). The lack of significance for caseload size does not mean that caseload size is not important. Perhaps the results would have been different when looking at participants levels of burnout or career intentions.

There was a significant difference in perceived workload manageability among resource SETs with one to six disabilities on their caseloads and those with seven or more disabilities on their caseloads. This result adds to the literature about caseloads with several disabilities. Carlson et al. (2002a) found that SETs with four or more disabilities on their caseloads were more likely to leave their jobs than those with fewer disabilities on their caseload. The SETs in this sample had an average of six disabilities on their caseloads. Rather than a caseload with only students with learning disabilities, for example, an average participant could have students with learning disabilities, autism, emotional and behavioral disorders, other health impairments, traumatic brain injury, and communication disorders. Students with different disabilities have diverse needs, and the SETs are responsible for a broad range of content and skills.

In the literature, large caseloads with a range of needs contributed to attrition (Brownell et al., 1997), intent to leave the field (Kaff, 2004), and stress (Fimian & Santoro, 1983). Additionally, several literature reviews described the connections

between caseloads with a range of needs and burnout (Brunsting et al., 2014), stress (Brownell et al., 2002; Emery & Vandenberg, 2010; Leko & Smith, 2010), and career intentions (Carlson & Billingsley, 2010), and also made SETs feel overwhelmed (Brownell et al., 2002; Eisenman et al., 2011; Miller et al., 1999; Moody et al., 2000) and exhausted (Ansley et al., 2016; Billingsley, 2011). The word “unmanageable” also appears frequently in the literature connected to caseloads (c.f., Berry & Gravelle, 2013; Billingsley, 2005; Carlson & Billingsley, 2010; Coleman, 2000; Carpenter & Dyal, 2007; Dinnebeil et al., 2019; Hagaman & Casey, 2018; Lashley & Boscardin, 2003; McCarty et al., 2003). The results of this study indicate that the number of disabilities on the caseload impacts the range of needs on the caseload and contributes to the manageability of the workload. The number of disabilities on the caseload may be more important than the number of students on the caseload.

Qualitative Research Findings

Following the quantitative phase of this study, seven participants with higher perceived workload manageability than the mean and larger caseloads than the mean were recruited for interviews about managing their caseloads. The third research question asked in what ways resource SETs with large caseloads and high perceived workload manageability use resources to meet the demands of caseload management. The transcripts were analyzed using thematic analysis and guided by COR theory. COR theory contends that a worker’s resources and job demands must be balanced. COR theory conceptualizes resources as objects, conditions, personal characteristics, and energies. The first theme, organization, was a personal characteristic resource with the sub-themes of strategies and scheduling. The second theme, support structures, was a

condition resource. No object or energy resources were found in the transcripts.

For each student on one's caseload, an SET holds IEP meetings (Bon & Bigbee, 2011; Carlson et al., 2002b; Carpenter & Dyal, 2001; Doren et al., 2012; Idol, 1988; Johnson & Semmelroth, 2014; McCoy & Glazzard, 1978; McLeskey & Billingsley, 2008; Murzyn & Hughes, 2015; Williams & Dikes, 2015) and ensures that the IEPs are in compliance with district, state, and federal policies (Bon & Bigbee, 2011; Carpenter & Dyal, 2001; Hogue, 2020). The participants were responsible for writing, organizing, and distributing paperwork (Adelman & Taylor, 1998; Billingsley, 2005; Carlson et al., 2002b; Carpenter & Dyal, 2001; McCarty et al., 2003; McCoy & Glazzard, 1978; Murzyn & Hughes, 2015; Russ et al., 2001; Williams & Dikes, 2015) for more than 30 students, and as many as 58 students in Ben's case. This made the qualitative sample ideal for discovering resources that SETs use to manage large caseloads. The theme of organization is not surprising, nor were the strategies surprising. However, the quotations from the participants show a variety of strategies the participants used, such as different ways to use spreadsheets or how to use templates to save time. Also, the participants discussed the importance of scheduling IEPs in a manner that allowed them to stay organized. This is a new addition to the literature about caseloads.

The participants also appreciated supportive administrators. Administrative support is a key variable in SET retention research (Ansley et al., 2019; Berry, 2012; Billingsley, 2011; Billingsley & Bettini, 2019; Griffin et al., 2008; Piotrowski & Plash, 2006; Vittek, 2015). However, the literature does not describe specifically how administrators can be supportive. The participants in this study added to the literature with specific examples of the support they received from their administrators, such as

substitute time to catch up on paperwork. Several participants felt that they were treated as the professionals and trusted that they would do their jobs effectively—they appreciated that their administrators gave them a lot of latitude.

Similarly, collegial support is a key factor in SET retention (Billingsley, 2011; Billingsley & Bettini, 2019; Bozonelos, 2008), but the literature does not describe how colleagues can be supportive of SETs. The participants in this study provided examples of sharing information about students with other SETs, collaborating on lesson plans, and trading time with other SETs when possible. The participants also liked when their general education colleagues were responsive and shared information about students. Lastly, the participants described collegial support received from related service providers.

The final sub-theme, support staff, added to the literature about different ways SETs can use paraeducator support. Although paraeducators are included in several state caseload policies (Hogue & Taylor, 2020), Oregon does not have any caseload policies. Some of the participants used paraeducator support for instruction; others used paraeducator support for basic paperwork and scheduling. For each meeting, administrators, parents, general education teachers, and various related service providers are invited, and usually there are competing schedules. For example, Ben has 58 students on his caseload. Ben liked that a secretary scheduled his IEP meetings, because he did not have to spend his time scheduling with each person on the phone or over email. This was a time saver that could be implemented in other districts.

Mixed Methods Research Findings

The fourth research question asked in what ways interviews with resource SETs

about managing their caseloads helped explain the perceived manageability of their workloads. The participants in the quantitative phase ($N = 119$) had an average caseload size of 30.3 and an average workload manageability score of 2.3. The participants in the qualitative phase ($n = 7$) were selected because they had caseloads larger than 30 students and perceived workload manageability scores over 2.3. The themes and sub-themes found in the qualitative analysis showed how these participants were able to manage their workloads. In the mixed methods integration, quotations from the qualitative phase explained why the qualitative participants had higher workload manageability scores. Although workload manageability has been studied in surveys of SETs (Bettini et al., 2017, 2018, 2020; Billingsley et al., 2004; Fall & Billingsley, 2011; Giangreco et al., 2011b), it has not been studied through mixed methods. The results from this study provide more understanding of SETs' workload manageability.

Implications

The previous section discussed the results of each research question. In the next section, the theoretical and practical implications of the entire study will be discussed.

Theoretical

This study answered the call for more research into how workload manageability connects to other variables (Bettini et al., 2017; Billingsley & Bettini, 2019), specifically caseloads. Large and unmanageable caseloads have been discussed in the research as challenging (Berry & Gravelle, 2013; Dinnebeil et al., 2019; Hagaman & Casey, 2018; Lashley & Boscardin, 2003), frustrating (Brownell et al., 1997), concerning (Billingsley, 2005; Carlson & Billingsley, 2010; Coleman, 2000; Carpenter & Dyal, 2007; Kaff, 2004; McCarty et al., 2003), overwhelming (Brownell et al., 2002; Eisenman et al., 2011;

Miller et al., 1999; Moody et al., 2000) and exhausting (Ansley et al., 2016; Billingsley, 2011). To address this, researchers recommended hiring more SETs to reduce caseload sizes, a difficult feat, considering the shortage. This recommendation only focuses on the word “large,” and not the word “unmanageable.” Unmanageable is a vague term, but the results of this study begin to explain what makes a caseload manageable. Some findings about caseload manageability were revealed in the qualitative phase. SETs in this study who found their workloads manageable were organized and had extensive support structures.

A key finding related to manageability is that the size of the caseload may not be as important as the variance within the caseload. Having students with varying needs and abilities (i.e., caseloads with students with different disabilities) may contribute to the manageability of the caseload. The field is moving away from SETs who specialize in specific disabilities; there may be some value in specialization.

Practical

Districts should consider the finding in this study that connected the number of disabilities on the caseload to the SET’s workload manageability. SETs may benefit from professional development in specific disabilities that students have on their caseloads. Caseloads could be distributed in a manner that allows SETs to specialize in specific disabilities. Also, another finding showed the importance of scheduling; caseloads could be distributed so that the IEP due dates are spread out throughout the year.

Preliminary research indicates that preservice SETs do not get much experience managing a caseload (Hagaman & Casey, 2018). Interviews with SETs in this study revealed organizational strategies that would benefit preservice SETs. Special education

teacher preparation programs should provide opportunities for preservice SETs to practice organizing the information and paperwork involved in caseload management. Districts should also provide opportunities for novice SETs to collaborate with experienced SETs, learn about possible organizational systems, and determine the system that works best for the novice teacher.

The results of this study highlighted the importance of administrative support for caseload management. The administrators that worked with the participants in this study provided specific support such as substitute coverage that allowed the participants to manage their caseloads. The administrators also treated the participants as professionals and honored preparation periods. These are low to no cost suggestions that administrators can implement. The substitute coverage can be no cost if the administrators allow teachers to swap preparation periods or combine classes. However, it is difficult to provide adequate support when one does not understand the importance of caseload management; Hagaman and Casey (2018) indicated that some administrators may not understand caseload management. Districts should provide opportunities for administrators to observe experienced SETs when they are managing their caseloads, so that they can learn how to best support their teachers.

Tony's and Cara's districts handled IEP scheduling in ways that might be of interest to other districts. Tony's district has designated IEP specialists who handle the scheduling and most of the paperwork. This removes the stress of scheduling meetings with all the required IEP team members. Cara's district asks that SETs schedule IEPs one day per month to allow the school psychologist to attend as many meetings as possible. Although Cara is responsible for scheduling, the meetings are condensed to one day per

month, which allows her to compartmentalize her workload to a certain extent. Schools could consider trying either of these strategies, although it is important to note that each system has not been studied.

Limitations

This study had some limitations. COR theory was the theoretical framework for the study, but it may not have been sufficient to understand participants' lived experiences. A different theoretical framework could have led to different understandings about caseload management. The sample was limited to one state; resource SETs in other states may have answered the questions differently and may have provided different resources in interviews. However, Oregon resource SETs were chosen for this study because Oregon does not have any caseload policies (Hogue & Taylor, 2020), and the assumption was that there would be a broader range of caseload sizes in a state without policies. The largest caseload in the sample was 58, and other states such as California allow a maximum of 28 students (Hogue & Taylor, 2020). Another limitation was the small sample ($N = 119$) for the quantitative phase. A larger sample may have provided different results. The quantitative phase of this study did not have priority; one of its functions was to identify resource SETs in the sample with high perceived workload manageability and large caseloads.

In the qualitative phase, only middle and high school resource SETs participated in the interviews. Elementary resource SETs may use different strategies to manage their caseloads. Part of the inclusion criteria for the interviews was that the participants have larger caseloads than the mean (i.e., greater than 30.3); the elementary SETs in the quantitative sample had much smaller caseloads than the mean ($M = 24.9$, $SD = 9.3$),

which meant there were fewer potential elementary resource SET participants for the qualitative phase.

One of the participants in the qualitative phase, Tony, worked with the researcher when she was a resource SET. Tony fit the inclusion criteria for interviews and was willing to be interviewed. The researcher focused on the interview protocol so that personal bias would not enter into the discussion, but as the two were former coworkers, there was a shorthand to their discussion that did not exist in the other interviews.

Lastly, some researcher bias may have entered the study. The researcher is a former Oregon high school resource SET who had 44 students on her caseload, but she would not have had high scores on the Workload Manageability scale. She purposely chose to interview participants with high workload manageability scores to counter her biases.

Future Research

The results of this study indicated several potential areas of future research. One key finding was that caseload size may not be as important as the number of disabilities on the caseload. Other studies could analyze the issues of caseload size and number of disabilities further. Also, literature indicates that the age range of students on the caseload is an important consideration (Burns, 2004; Carpenter & Dyal, 2001; Coleman, 2000; McCarty et al., 2003; Russ et al., 2001; Yocom & Beglau, 1996). The age range was not addressed by the research questions of this study; future research should analyze the importance of the age range on the caseload to understand if it contributes to the caseload's manageability.

The research questions in this study did not ask if there were differences in

caseload size among elementary, middle, and high school resource SETs, but the high school caseloads in the sample were larger than the elementary caseloads. Future research could analyze caseload sizes of different types of teachers to understand if there are different manageability issues. Also, there were no elementary SETs in the qualitative phase of this study. In a follow up study, interviews with elementary SETs may reveal other strategies that would benefit the field.

As described earlier, Tony's district uses IEP specialists for scheduling and paperwork. Future research could examine the use of IEP specialists to understand if it makes SETs' workload more manageable. Future research could also seek to understand the myriad ways districts allocate their special education human resources for caseload management.

Much of the research into the SET workforce centers on the negative: the problems, burnout, intentions of leaving the field, those who have left the field. However, this neglects the SETs who choose to stay in their jobs. This study showed the benefits of interviewing teachers with higher perceived workload manageability. The field would benefit from more research with SETs who feel positively about their jobs. The structure of this study could be replicated to understand other facets of SET working conditions. SETs who choose to stay in their jobs are a valuable resource to the field.

Final Thoughts

Although caseloads are mentioned frequently in literature about working conditions, there are few studies that have analyzed issues related to SET caseloads with research. That is, caseloads are mentioned frequently in literature reviews, but a large body of evidence about caseload issues does not exist. Yet, caseload management is an

integral part of the SET's job, and special education continues to experience a shortage. The results of this study showed that while caseload size was not a significant variable for participants' workload manageability, the number of disabilities on the SET's caseload was significant. This information can impact the field and practice by revealing the importance of the variety within a caseload. This finding is exciting because districts can focus on how they distribute students onto SET caseloads, rather than hiring additional SETs. The qualitative phase also revealed several low to no cost strategies that districts can implement in their schools. Lastly, the results of this study show that interviewing SETs who are happier in their jobs can reveal valuable insights to the field.

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Appendices

Appendix A

Workload Manageability Scale



1. I am teaching with adequate resources and materials to do my job properly.

- Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

2. My workload is manageable.

- Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

3. I feel I'm working too hard on my job.

- Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

4. Administrative duties/paperwork do not interfere with my teaching.

- Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Appendix B

Semi-Structured Interview Questions

Demographics

1. How many years have you been teaching?
2. What is your current caseload number?
3. In general, what are the demographics of your caseload? (students with mild/moderate disabilities, students with specific learning disabilities, etc)
4. What is your current schedule? (co-teach, study hall, etc)
5. How much preparation time do you have allotted into your schedule?

Semi-Structured Interview

8. How does your school/district determine each teacher's caseload?
9. What are the components that go into managing a caseload?
10. What strategies help you feel successful in managing your caseload?
11. What tools have you developed/gotten from others that help you manage your caseload?
12. Are there any conditions that help you manage your caseload? (Things that your administrator or district office does, ways the caseload is organized, etc).
13. What personality traits does a good case manager have?
14. Other thoughts/ideas related to case management?

Appendix C

Role of the Researcher

In quantitative research, the researcher's presence should not be felt, but in qualitative research, the researcher is closely involved with their participants. I had an emic perspective (Terrell, 2016) when interviewing participants in the qualitative phase. I used the interview protocol to guide the interviews, but I leaned on my perspectives as a former resource SET to clarify the questions when needed. I told them a little bit about my job experience and my interest in the topic so that they would know that I have experience managing a caseload. I tried not to influence their responses, but I made it clear through my responses (e.g., "Yeah," or "Uh huh") that I understood what they were talking about.

Although I had an emic perspective, I tried not to let my bias inform the interview experience. Before the interviews, I wrote the following bias statement:

I am a former resource SET who worked in Oregon. This is the same as the participants I'm seeking. I had a large caseload and I thought it impacted my ability as a SET. That's why I'm doing this study, but it also makes me biased. I worked actively against this bias by interviewing outliers with higher workload manageability, because hopefully they have more positive views of their ability to manage their caseload. I also have some ideas of what I would think would be helpful, so I don't want to guide my participants to those ideas. I need to make sure my questions are open-ended.