AN ABSTRACT OF THE THESIS OF

Sandra M. Shaw McDow for the degree of Doctor of Philosophy in Education presented on August 5, 1993. Title: A Study of Special Education STRs and Caseloads in Oregon and Their Impact Upon Teachers' Perceptions of Success, Job Satisfaction and Burnout.

Abstract approved: Signature redacted for privacy.

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The purpose of this study was to examine the relationships between student-teacher ratios (STR) and caseload sizes and feelings of success and satisfaction and three factors of burnout as reported by Oregon teachers of students with mild disabilities.

The target population of this study (N = 1347) were teachers of students with mild disabilities currently employed in the State of Oregon. A sample (n = 800) was drawn

from a list provided by the Oregon State Department of Education.

Data were collected during the winter and spring of 1993. Four hundred and twenty-six useable responses were returned. Both quantitative and qualitative data were collected, and analyzed, using a battery which included the 1993 Oregon Caseload Survey (OCS), and a structured interview guide, developed by the researcher, and the Maslach Burnout Inventory-Form Ed (MBI).

The research question was: Were there relationships between STRs and caseload size and teacher perceptions of success, satisfaction, and burnout? The major hypothesis was that large STRs and/or caseloads were major contributing factors to teacher perceptions of low job success and satisfaction, and to feelings of burnout.

Data were examined for the total sample (n = 426) and three subgroups, full-time traditional (FTT), full-time non-traditional (FTNT) and part-time (PT). For the total sample, no significant relationships were found between STR or caseload, and success and satisfaction. Significant relationships were found between STR and caseload, and emotional exhaustion for the total sample. For the FTT, a significant relationship was found between STR and emotional exhaustion and depersonalization. For the FTNT, a significant relationship was found between caseload and emotional exhaustion. For the PT group, significant relationships were found between caseload and success and satisfaction, and emotional exhaustion.

Analysis of the qualitative data revealed three common themes: (a) in importance, teaching students took precedence over required paperwork and other related activities, (b) the numbers of students with more severe and diverse disabling conditions have dramatically increased the demands on teachers' time and attention, and severely strained existing resources; and (c) teachers agreed that mandated STR and caseload caps were necessary to enable them to effectively meet individual student needs and at the same time adequately complete the related paperwork and activities required by law.

A Study of Special Education STRs and Caseloads in Oregon and Their Impact Upon Teachers' Perceptions of Success, Job Satisfaction and Burnout.

by

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The path leading to the culmination of this project was long and different from what I expected. When I started down the path, I knew it was long, with hills to climb, but I thought it was wide and smooth, and clearly marked. Later, I found it was sometimes obscured by unexpected twists and turns, and had many forks leading to other destinations, and to "dead ends." It was sometimes mountainous and rough, and was occasionally strewn with stones of discouragement and adversity. There were times, when I took a wrong turn, and reached a "dead-end," when I felt like stopping and turning back. But I did not travel this path alone.

I started down the path with the support and encouragement of my family and friends, and guidance and mentoring from the members of my doctoral committee, all of whom traveled with me.

Without these people, who chose to travel with me, I could not have reached my destination. I want to express my thanks and appreciation to all of those who traveled with me and helped me stay on the path: to my mother, and others in my family, who supported, helped and encouraged me all along the way; to my friends, Mary and Will Brown, who helped me toward my destination by helping me count, sort, number, address, "stuff" and get to the post office on time; to my son-in-law, Tom Keys who gave so freely of his time, talent and energy, helping me up that last, steep incline of formatting and printing my thesis; to Bonnie Young who guided and mentored me throughout this journey; to Bonnie Staebler who supported me all along the path, taking her time to secure funding which helped offset some of the expense entailed in implementing the survey; to my other committee members, Cleon Bennett, Forrest Gathercoal and Beverly Herzog, who were always available, offering ideas, assistance and encouragement; to Suzi Maresh who guided me through the "jungle" of statistics: and most of all, to my husband who was

beside me every step of the way, urging me on, making my journey easier by shouldering many of my responsibilities, and always lifting me up when I was "down."

This thesis is dedicated to the memory of my brother, Ronald T. Shaw, who started this journey with me and enthusiastically "cheered me on," until his untimely death in March of 1993.

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INTRODUCTION

Since the inception of Public Law 94-142, The Education for All Handicapped Children Act of 1975, increasing numbers of students have been identified as mildly disabled. Once determined eligible under the law, these students are provided special education services. That the increase in numbers of identified students with mild disabilities, particularly specific learning disabilities, has been continuous and dramatic has been well documented over time. Nationally, enrollment in programs for students with learning disabilities rose from a total of 1,135,559 students in 1978-79 to 1,745,865 students by 1982-83 (Chalfant, 1985). In 1984-85, of the 42 million children in our public schools, some 1.8 million (4 percent) were identified as students with learning disabilities [LD] and were placed in special education programs. Will (1986) reported that these figures represented an increase of 34,000 students over the previous year, 1983-84. In 1984, the U.S. Department of Education reported a dramatic increase in the number of students with learning disabilities, in spite of declining school enrollments (U.S. Dept. of Ed. 1984). By 1985, the increasing numbers of students with learning disabilities who were placed in special education services developed into a national problem (Chalfant, 1985). An analysis of numbers reported in 1978-79, and 1989-90 evidenced an annual growth rate of 1.6% of students with disabilities who were served nationally in public school special education programs (U.S. Dept. of Education, 1991). More specifically, during the 1989-90 school year, 4,068,709 children and youth, ages 6-21, with disabilities, were served nationally in special education programs. This is an increase of 97,016, or 2.2% from the 1988-89

school year. Of the students served in the 1989-90 school year, 2,038,720, were identified as students with learning disabilities.

Background of Present Problem

In 1986, Madeleine Will recognized what teachers have long understood. "Students with learning problems demand more of teachers in terms of both time and specialized assessment and teaching strategies" (Will, 1986). The only uniformly common characteristic of students with mild disabilities is their inability to fully benefit from the existing regular education system (Hagerty & Abramson, 1987). The unique and individual needs of these students are created by disabling conditions which vary "in their manifestation and degree of severity" but are such that "throughout life . . . can affect self-esteem, education, vocation, socialization and/or daily living activities" (ACLD, 1986).

The increasing numbers of identified students with mild disabilities as well as the unique educational needs of these students, and the time and paperwork requirements generated by legal mandates related to special education raise several major concerns.

Do the increasing numbers create excessive special education class sizes and caseloads which impact teachers' ability to meet the unique and individual needs of mildly handicapped students? What is the effect of class size and caseload size on teacher perceptions of their professional satisfaction and work-related burnout? Do teachers of students with mild disabilities become "distanced" from their students, becoming indifferent or unconcerned about student outcomes? All these factors potentially affect both the success of students with mild disabilities and the effectiveness of programs for these students.

The special education paperwork and related caseload activities required of special education teachers in one Oregon School District can be viewed as a example of what is

required of special educators statewide and nationally. These activities are legally mandated, and are monitored for compliance by the Oregon State Department of Education and by the Federal government.

Using a special education referral for suspected learning disabilities as an example, the special education teacher processes a minimum of six different forms; participates in a minimum of four meetings with other staff and parents; and participates in the academic and/or psychological testing of the referred student, for a minimum of 3.8 hours per student assessed, and an average of six hours (McDow, 1982). The cost of the referral to placement process has been estimated to be over $3,000 per child (Shinn, Tindal & Spira, 1987; Ysseldyke, Thurlow, Graden, Wesson, Algozzine, & Deno, 1983). These tasks are in addition to providing daily, direct instruction to students with mild disabilities and, often providing consultation to the regular education teachers of students with mild disabilities. (SST Handbook, 1992; LRC Job Description, Salem-Keizer Schools).

In addition, at least yearly, the special educator must, in collaboration with parents, develop a new Individualized Education Program for each student on the caseload. This activity entails processing a minimum of four forms for elementary, and five forms per high-school student with mild disabilities, plus a minimum of one meeting with parents.

New paperwork and activities related to the identification of, and the provision of special education and related services to students with mild disabilities evolve regularly. These additional requirements are the result of new court decisions that are rendered, and new interpretations of Federal or Administrative Rules by the Office of Special Education and Rehabilitative Services.

Among school districts throughout the United States, there is little agreement as to what constitutes either an appropriate student-teacher ratio (STR) or appropriate caseload, for teachers of students with mild disabilities. Ysseldyke, as part of his 1986 Student-Teacher Ratio Project, stated,

> It is virtually impossible to characterize state guidelines related to caseload or student-teacher ratios in a systematic manner because of the extreme variability in how the information is organized and then presented.

In an analysis of state guidelines, Ysseldyke found a "tremendous variability . . . in state departments of education for how guidelines were developed." Further, he stated that

> . . . frequently, with the reality of decreasing resources and increasing demands, the administrative reaction has been to increase student-teacher ratio and caseloads.

This is often done without regard to student needs or the severity of the disabling conditions and justified as being "cost-effective." Special education programs are often considered to be "prohibitively expensive" and children with disabilities are viewed as having less potential to become productive, contributing adults (Morsink, 1982). Increasing student- teacher ratios and/or caseloads without regard for the impact on students and teachers may prove more costly than cost-effective. Olson and Matuskey (1982) reported excessive paperwork and pupil teacher ratios as two of the most stressful school experiences reported by LD teachers. Fimian, Pierson, & McHardy (1986) reported that caseload size ranked among the strongest and most frequently occurring stressors reported by LD teachers. Excessive stress is costly to both the teacher personally, and to the educational organization for which the teacher works.

The personal cost of teacher stress may include poor physical health, emotional disorders, absenteeism, high levels of attrition, and early retirement (Dunham, 1977; Dixon, Shaw & Bensky, 1980; Holmes & Rahe, 1967; Kurtz, 1980; Kyriacou & Sutcliffe, 1979; Litt & Turk, 1985; Selye, 1956; Truch, 1980; & Wilson, 1981). McConaghy (1979) examined stress in teaching and found the life expectancy of teachers to be four years lower than the national average.

The organizational cost of teacher stress may not be clearly evident at "first glance," but is potentially staggering in terms of time, money and program efficacy.

An example of the organizational impact in terms of time and money, was provided by Bradfield and Fones (1985) who found that, in California, special education teachers with high stress reported an average of six days per year taken in sick leave while low stress teachers averaged less than two. Extrapolating from their sample, they estimated for California, for one year, a cost of well over a million dollars to pay for the lost work days of the high stress teachers compared to the low stress teachers. This study seemed congruent with the previous findings cited, and also Goldbert's (1978) findings that within the national workplace, stress contributed to employee deaths at a cost to employers of over $19 billion dollars per year; stress related absenteeism and hospitalization costs created a loss to employers of ten to twenty billion dollars per year; and that about 32 million workdays, entailing a cost of more than eight billion dollars were lost annually to stress-related diseases.

Although there is little research as yet on the effect of teacher stress on student performance and outcomes, Holland (1982) contended that teacher stress and burnout must have a debilitating effect on the process of education and the delivery of services to children with disabilities, in addition to the teacher's personal physical and mental health. Wilson's finding (1981) that as teacher stress was reduced, student performance improved, seems to support that contention, suggesting that there is a definite relationship between teacher stress and student performance.

The issues of increasing class sizes, or student-teacher ratios (STRs) and caseloads were addressed by the California Legislature in 1985, resulting in the 1986 special education legislation which clearly spells out caseload limitations;

> Caseloads for resource specialists shall be stated in local policies . . . . No resource specialist shall have a caseload which exceeds 28 pupils.
>
> Resource specialists shall not simultaneously be assigned to serve as resource specialists and to teach regular classes.

> At least eighty percent of the resource specialists within a local plan shall be provided with an instructional aide.

The terms "class size or student-teacher ratio" and "caseload" are often used interchangeably in special education, as the students served by the special educator in class often constitute the specialist's caseload. The two terms are often, but not always mutually inclusive. The California legislation addressed the concepts of student-teacher ratio (STR) and caseload within its description of "caseload:"

> . . . "caseload" shall include, but not be limited to, all pupils for whom the resource specialist performs any of the services described in subdivision (a) of Section 56362.
>
> (. . . provide instruction and services for . . . pupils . . . identified in an individualized education program . . . who are assigned to regular classroom teachers for a majority of a schoolday; [provide] information and assistance to individuals with exceptional needs and their parents; [provide] consultation, resource information, and materials needed regarding individuals with exceptional needs to their parents and to regular staff members; [coordinate] special education services with the regular school programs for each individual with exceptional needs enrolled in the resource specialist program; [monitor] student progress on a regular basis, [participate] in the review and revision of individualized education programs, as appropriate, and [refer] pupils who do not demonstrate appropriate progress to the [IEP] team)" (California Special Education Programs, A Composite of Laws, 12th ed. 1990)

Recently, a large Oregon school district sought information on special education class sizes or STRs and caseloads in Oregon. At that time (October, 1992) no such body of information was available. To date, information regarding student-teacher ratios and caseloads in special education in Oregon has not been collected - yet the critical issues related to special education class sizes and caseloads may ultimately affect the quality and effectiveness of services to Oregon's students with mild disabilities. Ysseldyke (1986), in discussing these issues, stated,

> . . . there is a need to document what is happening in special education classrooms . . . in terms of how many students are being served by a teacher and how many students are served at one time. It is critical to do so before we begin to examine the potential effects of different student-teacher ratios [class sizes] on the achievement of handicapped students . . . and, that we do so as part of the process of writing state and federal policy on the delivery of special education services.

Oregon ACLD, Inc., a major advocate for the students with learning disabilities, has taken the policy position for 1992-93 that Oregon needs a legislated maximum caseload for special education teachers; that this caseload maximum, which should reflect a combined STR/caseload as in the California legislation cited previously, should not exceed 25 students per teacher with a full time instructional assistant. Further, this needs to be a school standard for all special education programs in Oregon public schools.

This study provided information regarding STRs and caseload sizes as they currently exist in Oregon. In addition, it determined levels of teacher job satisfaction, feelings of success, and burnout, and relates these to the existing STRs and caseloads.

This information is a critical requisite for developing any kind of viable state policy regarding special education STRs and caseloads for teachers of students with mild disabilities. What maximum STRs and caseloads should be cannot be adequately determined without knowing what existing caseloads are, and how they contribute to teachers' perceptions of success, job satisfaction and burnout.

Statement of Purpose

The purpose of this study was to examine the relationships of student-teacher ratios and caseload sizes to teacher perceptions of success, professional satisfaction and work related burnout.

More specifically, this research was designed to examine the STRs and caseloads of

Oregon teachers of the mildly disabled (N = 1347). For this purpose, data was sought from a sample of this population (n = 800). This data was analyzed in relation to teacher reports of success, satisfaction, and feelings of burnout, as measured by the Maslach Burnout Inventory. The statistical data was further explored using qualitative methods.

Research Question

The research problem was expressed in the following question:

Are there relationships between student-teacher ratios and caseload size and teacher perceptions of job success, satisfaction, and the burnout factors of emotional exhaustion (EE), depersonalization (DP), and low personal accomplishment (PA)?

The major hypothesis of this study was that large STRs, and/or caseloads are major contributing factors to teacher perceptions of low job success and satisfaction, and to feelings of burnout, i.e., EE, DP, and PA.

Significance of Study

That class size and caseloads may contribute to serious problems in the field of special education seems indisputable. Numbers of identified students with mild disabilities are increasing yearly. This is compounded by the growing complexity and severity of individual student needs (Office of Special Education and Rehabilitative Svs., 1991), and the increased account-ability and mandated activities required of teachers of students with mild disabilities (Morsink, 1982). This potentially affects not only student success, but actual availability of qualified teachers for the mildly disabled.

According to Smith-Davis and Cohen (1989), a disproportionate number of teachers leave the field in the early years of teaching. Zabel, Smith and White (1984) considered job satisfaction, teacher stress and burnout to be critical issues related to shortages of

special education teachers. The high overall attrition rate in special education (Lauritzen, 1988) is primarily caused by isolation, burnout, stress, and related factors being elevated among special educators (Chandler, 1983; Fimian & Blanton, 1986; Fimian & Santoro, 1983). Smith (1979) reported estimated attrition rates for Michigan special education teachers of up to 34 to 50 percent, with rates of up to 21 percent at the end of the first year of employment and 53 percent at the end of the fifth year for teachers of students having emotional disturbance and/or behavior disorders.

This study represents new research on one of the emerging issues related to special education service. The primary impact and contribution that this research will have to the field of special education is that it will add to the very limited knowledge base available regarding the impact of STR and caseload on the variables of success, job satisfaction and burnout, which previous research has linked to teacher stress and teacher attrition.

Previous research and professionals in the field have pointed out the need for further research in the area of the relationships between teacher stress and its impact upon teachers and students. Lombardi and Donaldson (1989) and Olson and Matuskey (1982), for example, have pointed out the need to determine ways to prevent stress and the eventual loss of special educators to burnout. McIntyre (1988) identified the need for research to identify causal factors which explain more than a small amount of the variance in teacher burnout. Bakewell (1988), stated that research is needed to assess the effects of teacher stress on student attitudes and student achievement.

This research was the first examination of STRs and caseloads of Oregon teachers of the mildly disabled. The research provided information regarding the size of STRs and caseloads in Oregon, and their relationship to teacher perceptions of success and satisfaction and feelings of burnout, factors which research has linked with teacher stress and attrition.

Definition of Terms

The following terms and abbreviations were used in this study:

BUILDING RESOURCE ROOM	The specialist provides daily 1-1 or small group instruction to identified students with mild disabilities on a regularly scheduled basis in the resource room only -- no consultation service is provided.
BUILDING RESOURCE/CONSULTING	The specialist provides instruction in the resource room to students having mild disabilities, and/or consultation to regular education teachers and/or special, modified instruction in the regular education class room for students having mild disabilities.
BURNOUT	Feelings of emotional exhaustion, depersonalization and low professional accomplishment as measured by the Maslach Burnout Inventory directly related to the degree of stress within a person's occupational life.
CASELOAD	The students for whom the special education teacher is totally responsible, i.e. testing, consulting, teaching, program development, etc.
CATEGORICAL	Services provided based upon a particular, identified, handicapping condition.
CLASS SIZE	The number of students served daily through either direct or indirect service -- referred to throughout this study as student-teacher ratio (STR).
CONSULTATION	The specialist provides indirect, or support service to students with mild disabilities through consultation with regular classroom teachers who have the primary responsibility for instructing these students in the regular classroom setting.

DIRECT SERVICE	Service is provided directly to the student, usually in the resource room setting.
EMR	Students with mild mental retardation.
GENERAL TEACHING EFFICACY	A teacher's perception that students have the innate ability to learn.
ITINERANT PULL OUT PROGRAM	Serves students in two or more buildings at varying times and/or day, usually outside the regular classroom.
MBI	Maslach Burnout Inventory
NON-CATEGORICAL	Service provided on the basis of identified need rather than on an identified disability.
NON-TRADITIONAL MODEL	Categorical or non-categorical day or residential treatment, or "other" unique methods of service delivery.
OCS	Oregon Caseload Survey
PART-TIME MODEL	Service provided by teachers working less than 1.0 FTE through either traditional or non-traditional models.
PERSONAL TEACHING EFFICACY	A teacher's perception that he/she has the ability to teach and bring about student learning.
SED	Students with serious emotional disturbance.
SLD	Students with learning disabilities.
STR	The ratio of students to teacher as measured by class size -- the number of students served by the specialist, either directly or indirectly.
STUDENT WITH MILD DISABILITIES	Students with mild as opposed to severe disabilities -- includes EMR, SLD, and SED.
STRESS	Negative unpleasant emotions that result

	from overwhelming problems in the teaching situation.
TRADITIONAL MODEL	Categorical or non-categorical, itinerant, building resource, or building resource and consultation methods of service delivery.

Limitations of the Study

The following should be considered limitations in using this data in other settings:

1. The terms "success" and "satisfaction" as used on the Oregon Caseload Survey (OCS) are subject to individual interpretation.
2. Since the OCS and Maslach Burnout Inventory (MBI) were completed during the Winter term of the school year, generalizing the results to other times may not be appropriate.
3. This study did not address the issue of caseloads in terms of individual student needs, i.e. type, severity and degree of disabling conditions represented within caseloads.
4. The differences in "n"s between the identified sub-groups make valid comparisons of their responses difficult.

Basic Assumptions of the Study

1. The items on the OCS were clearly understood by each respondent.
2. Respondents answered OCS and MBI items accurately and truthfully.
3. The sample was truly representative of the target population.

REVIEW OF THE LITERATURE

To provide the foundation for this study, this review of the literature will cover the following three topics:

Class size

Burnout

Success & Satisfaction

Class Size

Class size and its relationship to student success, has been a major issue in regular education for many years, as is evidenced by the existing body of research completed on that topic dating back to 1900. While the results of these research studies have often provided inconclusive and contradictory information, leading to confusion regarding the issue of class size, some credible conclusions emerged (Helmich & Wasem, 1985).

Three major reviews of the literature done in the late 1970s supported the following conclusions:

> Small classes in the primary grades are important for reading and mathematics achievement (Educational Research Service [ERS], 1978);
>
> Primary students taught for two or more years in small classes are more likely to show increased achievement (ERS, 1978);
>
> Pupils with lower academic ability tend to benefit more from small classes than do students with average ability (ERS, 1978);
>
> Most teachers perceive large classes as negatively influencing teacher morale and job satisfaction, as well as student academic performance and social and personal development (ERS, 1978);
>
> As class size decreased, academic achievement increased, with major benefits shown when class size was less than 20 students (Glass & Smith,

1978);

Reduction in class size was associated with higher quality schooling and more positive attitudes (Glass & Smith, 1979);

Small class size was associated with higher quality classroom environments, better student attitudes, and greater teacher satisfaction (Glass & Smith, 1979);

While there were some questions regarding the meta-analyses procedure used by Glass and Smith, some findings from these three reviews remained unchallenged (Helmich & Wasem, 1985):

Smaller classes provide more opportunities for individualized instruction;

Younger children appear to benefit from smaller classes;

Other variables such as the emotional climate of the classroom, instructional techniques, student characteristics, etc., are a component of the effectiveness which is attributed to class size effects on student achievement and school adjustment.

The implications of increasing class size and/or caseloads involving students with mild disabilities, in terms of student outcomes, are little known, as "most studies that have looked at class size in special education have focused primarily on the severely handicapped population . . . " (Ysseldyke, et al., 1986).

Caccamo (1985) reported that the Focus Curriculum Program, implemented in Independence, Missouri in 1984, limited the STR to 10:1. The program, which was one quarter of the school year in duration, provided students with a six hour school day focused primarily on reading instruction. It also provided one hour each of instruction in math and recreational PE. The students with learning disabilities who were served in this program made a significant improvement in reading ($p = .01$). These reading gains were sustained for at least one year after the students left the program.

In addition, follow-up teacher and parent surveys indicated that the program improved children's self-concept, allowed for more individualized attention, and helped children improve their attitudes about school.

In a review of the literature done by the State Department of Education in South Carolina (1980), one definite conclusion was reached: "Small classes at least provide the opportunity for improved instructional practices, warmer interaction, and increased student achievement." Further results of this literature review concluded that in smaller classes, teachers provide more individualized instruction, and develop more innovative, diverse and creative teaching practices. Furthermore

> . . . while optimal class size is greatly dependent on the types of students involved and their special needs, there is some evidence that low achievers are more favorably affected by small class size than pupils with average ability or above . . . . It appears that the type of student involved is . . . of extreme relevance to the most appropriate class size.

Most class size research has been concerned with regular education classrooms. Because special education classes, or STRs, tend to be smaller than regular education classes, most of the class size research is only indirectly applicable to special education. Yet, the issue of class size and its effects on student success in special education, which is mostly undocumented, is important. Large class size potentially affects not only the student, but the teacher's effectiveness in providing special education services. Research has documented that class size is a factor related to teacher stress (Alshuler, 1980; Bensky, Shaw, Gouse, Bates, Dixon & Beane, 1980; Cichon & Koff, 1978). It is believed that inordinate stress frequently leads to burnout (Dixon, Shaw & Bensky, 1980). Burnout can result in teacher job performances suffering, and can create less than optimal school experiences for both teachers and students (Ysseldyke et al., 1986), through which students may suffer not only lowered academic performance, but also lower self-esteem as

a result of uncaring or preoccupied teachers (Partin & Garguilo, 1980).

Pennsylvania has formally recognized and addressed the issue of special education STRs and caseloads. Effective July 1, 1990, the Pennsylvania Special Education Standards mandated both STRs and caseloads for teachers of students with mild disabilities as follows: Learning Support Resource Room teachers, who serve primarily students with mild disabilities, have caseloads restricted to a total of twenty students. Further, individual classes are limited to eight students for each specialist with an instructional assistant. Emotional Support Resource Room teachers in Pennsylvania, who serve students with learning and emotional disabilities, are limited to overall caseloads of twenty students, with individual class sizes, or STRs, of no more than six for each specialist with an instructional assistant (Pennsylvania Department of Education Standards, 1990).

With the advent of PL 94-142, and the resulting laws and regulations governing teacher accountability and the protection of the rights of children with disabilities "the responsibilities of special educators have increased, along with financial pressures resulting in fewer sources of support and assistance" (Morsink, 1982). This demand for increased accountability is occurring in an era of budgetary constraint. It often reveals itself at the classroom level as "restructured [increased] student-teacher ratios" done "without information on the effects of increasing [the] ratios" (Ysseldyke, et al., 1986). These conditions have brought student-teacher ratios, and/or class size, to the fore-front as a special education issue.

Burnout

The percentage of burned-out teachers in U.S. public schools may range from a high of 93% to a low of 2%, depending upon the definition of burn-out used, and the methods of data collection employed (Stephenson, 1990). Further,

> Burnout might be regarded as the final stage in progression of failed attempts to cope with negative stress conditions.
>
> Burnout is best described as a process rather than an event, and it typically occurs when people with inadequate stress management and need-gratifying skills must work in a stressful and need-frustrating work environment . . . the signs of burnout appear slowly, over time, and with ever-increasing severity.

Sparks and Hammond (1981), in their review of the literature on teacher burnout, cited a 1978 study of teacher stress, by the Chicago Teachers Union. This study found that two of the five top stressors in teaching were dealing with student misbehavior and teaching in overcrowded classrooms. A second study cited by Sparks and Hammond (1981), was done by the New York Teacher's Union in 1980, and reported results similar to those of the Chicago study. Two of the five most stressful factors identified in the New York study were managing disruptive children and teaching in overcrowded classrooms. Studies on special education teacher burnout suggest that there may be a relationship between the level and degree of teacher responsibilities and teacher stress, which leads to burnout. Olson & Matuskey (1982) determined that three of the six major stressors for teachers of students with learning disabilities were excessive paperwork, high STRs, and inadequate planning time. Fimian & Santoro, 1981, found that inadequate preparation time, a rapid daily pace, and large class sizes or caseloads were often reported as sources of stress; Fimian, Pierson & McHardy (1986) also found "too large a caseload" was a major stressor for teachers of students with learning disabilities.

Fimian & Santora (1981) also reported that a major source of special education teacher stress resulted from issues surrounding student-teacher relationships. Primary stressors identified were insufficient time to spend with individual students, the frustration of repeatedly having to deal with student misbehavior, inadequate discipline policies and having to work with poorly motivated students.

The rate of attrition due to burnout and other factors is extremely high for special education teachers (Morsink, 1982). Smith (1979), after completing a five-year study of Michigan special education teachers, found that the cumulative attrition rate for special education teachers was 34-50% at the end of the five year period. Gersenick and Huntze (1981) found that, nationally, approximately 20% of teachers trained to work with severely emotionally disturbed students never took a first job, and Algozzine estimated in 1982, that 6% of the nation's 250,000 special education teachers burn out each year. Further, Algozzine indicated that many special education teachers feel physically and emotionally exhausted, frustrated, negative, cynical and irritable. He noted that teachers under stress may work harder and longer, yet be less productive. These studies suggest that teacher burnout results in part from job-related stress. Much of this stress is created by the increased demands placed on teachers and the teachers' growing inability to meet these demands. In light of these studies, the results of Hunter's survey (1977), which found that teachers, air traffic controllers, and surgeons were considered to hold the most potentially stressful occupations in the world seem to have foretold a serious situation which is detrimental to teachers, students and the educational system.

Success and Satisfaction

Success

Teacher success, or efficacy, has been defined as a two-part set of teacher expectations related to the impact of teaching on student performance (Ashton & Webb, 1986), general teaching efficacy and personal teaching efficacy.

Teachers with a sense of high general teaching efficacy believe that students have the innate ability to learn, and teachers with a sense of high personal teaching efficacy believe they have the ability to teach to bring about student learning (McDaniel & DiBella-

McCarthy, 1989). Webb (1982), found that teachers low in general efficacy tend to attribute students' failure to achieve to students' innate lack of ability or background, rather than to the teacher's lack of ability. These teachers tend to accept greater responsibility for success than for failure. They tend to believe there is little they, or any other teacher, can do to prevent student failure (Webb, 1982).

Although researchers have reported that student achievement appeared to be strongly related to the teachers' sense of overall teaching efficacy (Armour, et al., 1976), and that teacher's attitudes about their personal teaching efficacy may have major effects on learning outcomes (Berman, McLaughlin, Bass, Pauly, & Zellman, 1977), there is little research directed at special education teachers' feelings of success, or efficacy. In 1989, however, Corbitt reported findings which related to Webb's (1982) observations regarding teacher efficacy. Corbitt (1989) reported that while the educators in her sample often worked in sub-standard facilities with insufficient materials and little administrative support from the building or district level, they held a high opinion of their personal teaching efficacy. For these teachers, student needs took precedence over everything else. These teachers reported the perception that they personally had the skills to enhance student learning. Any lack of student success in achieving program goals was attributed to external forces rather than any lack of skill on the teacher's part.

Satisfaction

In summarizing studies on teacher burnout, Sparks and Hammond (1981) found evidence that teachers were less satisfied with their jobs than other groups of college graduates. Sparks (1979) suggested that the satisfaction teachers derive from their work and the energy and creativity they bring to their classrooms is diminished due to job-related stress. On the other hand, Maslach (1978) stated that job dissatisfaction and burnout are not synonymous constructs. Still other research with teachers (Anderson,

1980: Sweeney, 1981) indicated a possible connection between job satisfaction and burn-out, with the categories of self-esteem and self-actualization used as indicators of job satisfaction. Among regular educators, dissatisfaction was associated with higher levels of stress (Sutton & Huberty, 1984), attrition, absenteeism, and illness (Culver, Wolfle & Cross, 1990). Fimian & Santoro (1981) found that many teachers enjoy and are satisfied with their jobs, while still experiencing moderate to high levels of stress; and, at the same time, low-stress teachers reported significantly more job satisfaction than did medium or high-stress teachers.

A survey of all West Virginia University Special Education Master's Degree students, in 1985, yielded more paradoxical results. While 88% reported teaching in special education to be a satisfying career, and 94% expressed the belief that their individual teaching efforts "make a difference," 48% stated they would select another profession if beginning a career at the time of the survey. Further, 37% would leave teaching if offered a position outside of special education with at least an equivalent salary, and only 35% planned to continue teaching special education until retirement (Lombardi & Donaldson, 1989).

Farber (1984), and Raschke (1985), in studies of teacher satisfaction in regular education, each identified two aspects of teaching as the most satisfying. Experiences that made teachers feel sensitive to and involved with students were identified as highly satisfying. In addition, experiences that gave teachers feelings of competence, importance and commitment to their jobs added significantly to their job satisfaction. Billingsley and Cross (1992) found job satisfaction for both regular and special educators to be positively influenced by strong administrative support, increased work involvement and lowered levels of role conflict. For special educators, lowered levels of stress and role ambiguity were also associated with greater job satisfaction. Porter, Steers, Mowday & Boulian (1974) found a significant relationship, across various groups, between job satisfaction and

the propensity to remain with an organization.

The research reviewed here on teacher perceptions of success and satisfaction suggested that perceptions of success and satisfaction may be negatively impacted by stress; they may affect teacher health and attrition; and, they very probably impact students' success and self-concept.

RESEARCH METHODOLOGY AND PROCEDURES

Design of the Research Study

This chapter describes the quantitative-qualitative research design and the implementation of this study. First, the quantitative component of the research design is presented, including a description of the instruments used in this part of the study. Data collection procedures, including the respondents sampled and the administration of the questionnaire are described. Next, a summary of the data analyses procedures, including descriptive statistics and inferential statistics is provided.

Secondly, the qualitative components are presented. These include examples of the open-ended written comments from the returned survey questionnaires which were used as a basis for developing the interview instrument. The interview procedures are described. These include how the interview format was developed, how interviewees were selected and how interviews were conducted.

This project was a descriptive study of the relationships between class sizes (STRs) and caseload sizes and feelings of success and satisfaction and three factors of burnout as reported by Oregon teachers of students with mild disabilities. A causal-comparative study of these variables was done, followed by an analysis of the open-ended written comments from the returned survey questionnaires and an analysis of the personal interviews with ten survey respondents.

The multiple data collection strategies used extended the dimensions of the study by providing triangulation. Triangulation is considered to add strength and correct some of the deficiencies created by using any one source of data (Patton, 1987). Denzin bases the logic of triangulation on the premise that

> no single method ever adequately solves the problem of rival causal factors .

> . . . Because each method reveals different aspects of empirical reality, multiple methods of observations must be employed. This is termed triangulation. I . . . offer as a final methodological rule the principle that multiple methods should be used in every investigation (Denzin, 1978).

Several types of triangulation exist, as conceived by Denzin (1978). Methodological triangulation was utilized in this study. Methodological triangulation involves the use of multiple methods, such as interviews, observations, questionnaires and documents, to study a single problem or program (Denzin, 1978). The methods used in this study were quantitative analyses of survey questionnaires, a qualitative analysis of the written comments, and a qualitative analysis of the personal interviews.

Instrumentation

The battery included two different instruments. Each addressed different variables studied in this work. The two were (a) The 1993 Oregon Caseload Survey (OCS), developed by this researcher, and (b) the previously published and copyrighted Maslach Burnout Survey, second edition, Form Ed (MBI). The battery consisted of 42 items, plus demographic questions.

The Oregon Caseload Survey

Description

The OCS was developed by this researcher to collect information relevant to this study. The instrument was designed to collect both subjective data related to teacher feelings and opinions about STRs and caseloads, and objective data regarding existing class and caseload sizes. It also collected demographic data.

The subjective items included ratings of job success and job satisfaction. Teachers were also asked to identify what maximum caseloads should be. Demographic items

included years of teaching experience, grade levels served, existing STRs and caseloads and service delivery models. In addition, teachers were asked their age, sex, level of specialized training, and whether they worked as a special educator full time or part-time.

Field Test

The survey was field-tested with three different groups prior to its final form. Those participating in the field testing were asked to make comments and suggestions regarding the validity, relevance and clarity of each item.

The first field test was done by a group of 10 special education teachers in Salem, Oregon. This group was formed to develop an instrument to gather class-size information for the Salem-Keizer School District. The group included elementary, middle school and high school special education teachers. The second group to field test the OCS was a class of 18 graduate students at Western Oregon State College (WOSC). Each of these graduate students was an experienced special educator, completing coursework required for a standard Handicapped Learner Endorsement. After each of these field tests, the OCS was revised and clarified in light of the responses, comments, and suggestions.

The final field test was done with a group of 10 special education teachers of students with mild disabilities from the Salem-Keizer and two nearby districts. After this final field test, the instrument was reviewed by the researcher and a delphi panel of WOSC special education professors, revised for the third and final time, and prepared for mailing.

The Maslach Burnout Inventory - Form Ed

The instrument for assessing the emotional exhaustion, depersonalization and professional accomplishment variables was the Maslach Burnout Inventory (MBI), second edition, Form Ed which was developed by Christina Maslach and Susan Jackson (1986). These two researchers constructed the original MBI to assess burnout in a variety of

helping professions in 1981. The MBI, second edition, is the result of an additional eight years of burnout research. The MBI - Form Ed was developed in response to the growing interest in teacher burnout evidenced by the increasing numbers of studies focusing specifically on the teaching profession.

The teaching profession has become a focus of research due to the high visibility of teachers and the ever increasing pressure on schools to provide a broad range of social services. Researchers are aware that many teachers are leaving the profession while fewer are choosing to become teachers. These conditions all serve to generate concerns regarding burnout (Schwab, 1990).

The MBI-Form Ed consists of three burnout scales: (a) Emotional Exhaustion (EE), defined as the tired and fatigued feeling that develops when emotional energies are drained; (b) Depersonalization (DP), defined as indifferent, unfeeling attitudes towards students; and, (c) Personal Accomplishment (PA), defined as feelings of competence and successful achievement. The burnout scales are all self-administered.

Validity

In addition to the numerous studies by Maslach and Jackson (1984), substantiating the validity and reliability of the MBI-second edition, Form Ed has been subject to separate, additional research, including factor analytic studies by Iwanicki and Schwab (1981) with 469 Massachusetts teachers, and Gold (1984) with 462 California teacher education students.

Reliability

Further, Iwanicki and Schwab reported, in regard to reliability, Cronbach alpha estimates of .90 for EE, .76 for DP and .76 for PA. Gold (1984) reported estimates of .88, .74, and .72, respectively.

Scoring

Each aspect of burnout, EE, DP and PA is assessed using a frequency dimension. For

each of the 22 items on the MBI-Form Ed, teachers were asked to respond once, using a Likert-type rating scale. Seven rating choices existed for each item or statement, ranging from "Never" (0) to "Every day" (7).

The three subscales of the MBI-Form Ed are scored separately and not combined into an overall score as there has not yet been established a meaningful way of combining the scores. Examining the pattern of the subscale scores provides the most meaningful information.

Quantitative Data Collection Procedures

Population and Sample

The target population of this study (N = 1347) were the teachers of students with mild disabilities currently employed in the State of Oregon. A sample (n = 800) was selected by taking every third name from a list provided by Oregon State Department of Education. These eight hundred teachers represented 59% of the total number of teachers of students with mild disabilities reported by the Oregon Department of Education in January, 1993.

Procedures

Surveys were mailed in January, 1993, to the 800 selected special education teachers. The survey contained a cover letter (Appendix A) which explained the purpose of the survey, solicited teacher cooperation and offered them an opportunity to receive a summary of the final results. It also included the previously described instrumentation (Appendix B), and a post-paid return envelope. The surveys were coded with an identification number at the initial mailing to ensure confidentiality. A follow-up post card (Appendix C) was sent to non-respondents three weeks after the initial mailing. Only those surveys

received within 45 days were included in the final data analyses.

A total of 540, or 66.5% of the surveys were returned. Of the 540 returned surveys, 72 respondents were not currently teaching students with mild disabilities; 8 were no longer at the teaching address shown, and 34 were returned too late to be included in this study. This left a total of 426 useable surveys.

Quantitative Data Analysis Methods

Data were examined for the overall group of respondents in regard to reported levels of success and satisfaction, reported levels of burnout, STR and caseload sizes, and service delivery models.

Subgroups

During the examination of the overall data, it became apparent that the respondents fell into three naturally occurring subgroups. Therefore, data were also examined for each of these subgroups:

Full-time traditional

This group included all full-time teachers providing service through " traditional" models. Traditional models, for purposes of this study, included categorical or non-categorical, itinerant, building resource, or building resource and consultation methods of service delivery. This group included 304 respondents, or 72% of the sample.

Full Time Non-traditional

This group included all full-time teachers providing service through "non-traditional" models. Non-traditional models, for purposes of this study, were defined as categorical, or non-categorical day or residential treatment, or "other" models of service delivery. This group included 77 respondents, or 18% of the sample.

Part-time

This group included all part-time teachers providing service through categorical or non-categorical traditional or non-traditional models. This group included 43 respondents, or 10% of the sample.

Two respondents failed to report their delivery model. Therefore, two cases were missing in the above groupings, which represented 424 respondents.

Descriptive Statistics

All survey items were summarized, providing descriptions of value labels, values, frequencies, percents and cumulative percents for all data reported. Measures of central tendency and variability provided mean scores, standard deviations, standard error, ranges and frequency distributions. In cases of incomplete surveys, the items not completed were not reported for that particular item. Summary descriptive statistics for the demographic items were completed for the total 426 respondents.

Inferential Statistics

Correlational Statistics

The Pearson product-moment correlation coefficient (r) was used to investigate relationships between STRs and caseloads and the three burnout variables on the MBI-Form Ed. This statistic was used because the data reported from the MBI-Form Ed was considered to be continuous data. The correlations indicated both the direction (positive or negative) and the strength of the relationships between the variables.

One-way Analysis of Variance

A one-way analysis of variance (ANOVA) was used to determine the relationships between each of the two independent variables, success and satisfaction and each of the

two dependent variables, STR and caseload. This procedure was used, as the independent variables of success and satisfaction were considered to be ordinal data, and the dependent variables of STR and caseload were considered to be continuous data. Data from the total sample and each subgroup were examined with the ANOVA procedures.

The statistical analyses of the data provided served as the basis for affirming or denying the hypotheses.

Qualitative Data Collection Procedures

Borg and Gall (1983) contended that a basic problem of causal-comparative studies is that while they are good for revealing relationships between variables, they offer little help in clarifying the causal patterns underlying these relationships. On the other hand, "qualitative research is oriented toward the search for . . . the interpretation and meanings people give to events, objects, other people, and situations in their environment" (Stainback & Stainback, 1988).

The qualitative analysis methods used in this project provided triangulation to strengthen the study, and a holistic approach for collecting data. Survey questionnaire items typically provide only quantifiable content. However, peoples' perceptions of educational concerns are multiple, complex, and changing . . . (Stainback & Stainback, 1988). Thus, the qualitative methods were added to enhance the interpretation and understanding of the quantitative data.

Qualitative methods consist of three kinds of data collection (Patton, 1987): (a) written documents, including sources such as open-ended written items on questionnaires; (b) personal interviews; and (c) direct observation.

In an attempt to determine causal patterns underlying the relationships identified through the statistical analysis of the data, the researcher conducted two types of qualitative data collection.

OCS Written Comments

Open-ended comments from the returned surveys were analyzed for common themes and concerns. These comments ranged in length from one paragraph to four pages.

Procedure for Obtaining Themes

To isolate and identify themes within the written comments, the researcher first reviewed all the written comments from the OC surveys, looking at opinions and concerns expressed there. If a similar opinion or concern occurred and recurred frequently it was categorized by the general content and identified as a theme.

To name themes, the researcher then compared the content of the categories identified as themes with constructs developed from previous research related to stress and burnout. When the themes identified from the written comments were very similar, or related in terms of focus, to constructs from the literature, the researcher used that construct as a basis for giving the theme the same, or a similar name. For example, comments expressing concerns related to frustrations with inconsistencies in the respondent's job role and expectations were very similar to the construct of role conflict and ambiguity presented by McIntyre (1983). So, the theme dealing with frustrations and inconsistencies in job role and expectations was called role conflict and ambiguity.

The researcher then briefly defined or described the research constructs related to each theme and gave examples (excerpts) of the comments which supported the relationships and naming procedure.

Three common themes were identified: (a) role conflict and role ambiguity, (b) administrative leadership and support, and (c) control of paperwork and time.

Role conflict and ambiguity. McIntyre (1983) defines role conflict and role ambiguity as:

> . . . the simultaneous occurrence of two or more sets of inconsistent, expected role behaviors for a teacher, . . . and the lack of clear, consistent

information regarding responsibilities, rights and duties of a teacher.

Typical of the written comments which spoke to the construct of role conflict and role ambiguity are the following:

> . . . I am really tired of having to be a detective, covering myself & my school & my district's rear ends legally, & constantly being told about the latest state & federal decisions about how I'm now supposed to handle situation A, B, or C; or fill out paperwork in a new way, or consider students we were previously told A about, but now consider to be B & handle differently.
>
> . . . We discuss issues [regarding students] that no staff member was trained for . . We are asked to be knowledgeable enough to know who to refer [the student, parents & families] to, get the letters & releases of information done, follow through, follow up, report back . . . etc. . . . there's often little left for the actual investment in the child, as we scurry to write, call, fill out, etc.
>
> . . . In trying to maintain a program of pull-out support, consultation, prevention and work with inclusion within 5 multi-age classrooms I am struggling with the diverse responsibilities.
>
> Not possible for one specialist to handle . . . resource room, collaboration and team teaching, paperwork and meetings . . . I stay at school till 5 or 6 or 7 p.m.

Administrative leadership and support. Research studies of the importance and impact of the principal's leadership style and ability are "plentiful." School effectiveness literature links leadership to school climate, teacher morale, and organizational performance (Blase, 1987). Principals of effective schools exhibit a core of common attitudes and leadership behaviors, such as supportiveness, tolerance, high expectations, orderliness, responsible instructional planning, and clear communication (Brandt, 1982; Lesley & Wayson, 1982; Sweeney, 1982).

Many of the survey comments described administrative leadership and support in both positive and negative terms:

> I work with an incredible staff and administrative team. If I did not work in this positive setting I would not be able to survive with the children I have.
>
> My frustration is in dealing with administrators who seem to see my program and my students as a constant drain on their school . . . They [administrator & counselor] constantly refer to the 'wasted' space, time and people of my program.
>
> While extra paperwork adds stress, the highest degree of frustration and stress, for me, has come from having an administrator who is not supportive (e.g. wants to impose his or her ideas, change the program, make decisions affecting the program on specific kids without collaborating). Also, working with other teachers who are not supportive . . . can be frustrating.

Control of paperwork and time. Control of paperwork and time appear to be related to the construct of locus of control. Locus of control, as defined by Rotter (1966), is the degree to which the individual perceives that a reward follows from, or is contingent upon his own behavior or attributes versus the degree to which he feels the reward is controlled by forces outside of himself and may occur independently of his own actions. More simply put, locus of control is the degree to which one feels control over various aspects of one's life (McIntyre, 1987). The construct of locus of control is insinuated in many of the written responses relating to control of paperwork and time.

According to Corbitt (1989) special education teachers tend to have a strongly held and central belief in the importance of individual student needs and give precedence to the learning processes over everything else related to practices and procedures. Many of the respondents in this study seemed to hold that belief, and expressed the perception that required paperwork and time constraints were out of control, or controlled by external "forces," which created major conflicts in their jobs:

> . . . It feels out of control . . . . I am stretched too thin to do a good job for the kids. If I do a good job for the kids at school, I have nothing left to give my own 2-1/2 year old son and partner when I come home. These are not good choices.

> Before I took this job, I thought I would be working with students. Now instead of teaching, the majority of my time is spent on paperwork . . . . I may not be able to work with students, but "boy howdy," I sure have nice files when the State comes for a monitor visit!
>
> The time needed to complete this [paperwork] and the pressure to have it done "correctly" are the major negatives of my job. As I find myself spending more time and energy on paperwork, most of which has little or nothing to do with helping students, I am seriously considering a switch to regular education so I can again focus my energy on working with students.
>
> Many times the laws end up hurting the students they are designed to help because special education teachers are taken from direct contact with students to deal with the paper chase.
>
> Dealing with the paper load and the number of meetings is overwhelming. I feel I am behind most of the time. I have a very supportive administration. They are willing to hire a sub for me so I can "catch up," but I would much rather work with kids.

Personal Interview Procedures

Sample

The interview sample was first identified from a computer generated list of subjects having caseloads of 35 or more students, who scored in the upper twenty-five percent on the burnout factor scores, and in the lower twenty-five percent on the burnout factor scores. From the list of subjects with high burnout factor scores, the five individuals reporting the lowest feelings of satisfaction and success were then selected for interviews; from the list of respondents with low burnout factor scores, the five individuals reporting the highest feelings of satisfaction and success were also selected for interviews. This allowed the researcher to examine and compare the content of interviews from individuals having the greatest contrast in burnout scores, and satisfaction and success ratings, on issues related to the themes of job ambiguity and conflict, administrative leadership and support, and control of paperwork and time. All of the interviewees were full-time teachers with more than five year's experience.

Types of Interviews

According to Patton (1987), "The fundamental principle of qualitative interviewing is to provide a framework within which respondents can express their own understandings in their own terms."

Patton (1987) described three basic approaches to qualitative interviewing: (a) the informal conversational interview, (b) the general interview guide, and (c) the standardized open-ended interview. These differ in several respects.

The informal conversational interview is typically used as part of ongoing participant observation fieldwork and entails no predetermined set of questions. It relies on spontaneous questions generated during the natural flow of an interaction. A great amount of time and multiple interviews are required with this technique to get systematic information.

The interview guide consists of a list of questions or issues that are explored during the interview. Essentially the same information is obtained from a number of people while all the basic issues or topics are covered. This interview method gives the interviewer the latitude of building a conversation within a particular subject area and wording questions spontaneously and conversationally while keeping the interaction focused on the previously identified question or issues.

Both the informal conversational and interview guide techniques involve recursion. According to Stainback & Stainback (1988), recursion refers to the extent to which what is done has been generated from preceding information. Recursive questioning "may expand and deepen the knowledge base," while allowing the interviewer to " . . . treat people and situations as unique . . ." (Schwartz & Jacobs, 1979).

The standardized open-ended interview is a carefully worded and arranged set of questions which takes each respondent through the same questions in the same sequence with essentially the same words. Its primary use is to gather information while minimizing the variation in questions which can result in bias occurring when different interviews for

different people produce varying amounts and types of data. This format is useful in evaluations when a participant is interviewed only once. It ensures the same information from each interview participant. Further, it enhances data analysis and lends itself to easy replication.

Structured Interview Guide

A structured interview guide was developed for use in this study (Appendix D). It was designed to address issues which evolved from extrapolation of the three major themes identified in the analysis of the written comments.

After it was developed, the structured interview guide was field tested with special education teachers in the Salem-Keizer district. After the field testing, the survey questions were clarified and refined to more specifically address the identified issues.

The telephone interviews were conducted by this researcher and were tape recorded at the time of the interviews with the permission of the interviewees. They were later transcribed for analysis and evaluation.

RESULTS OF THE STUDY

This chapter provides (a) a description of the study sample demographics, (b) an examination of the research hypotheses using the quantitative data collected, and (c) a discussion of impressions and themes emerging from the analysis of the written comments and the follow up interviews.

Study Sample Demographics

Four hundred and twenty-six returned surveys were utilized for the demographic data for this study. On two to three of these surveys, however, one or more non-demographic items were incomplete. In order to adjust for this, in each section of data examined and reported in this study, the "n" shown reflects the number of cases reported in the data for that section.

The sample (n = 426) was comprised of 54% elementary teachers, 37% secondary (grades 7-12) school teachers and 9% teachers who identified themselves specifically as middle school teachers from districts throughout Oregon, as illustrated in figure 1.

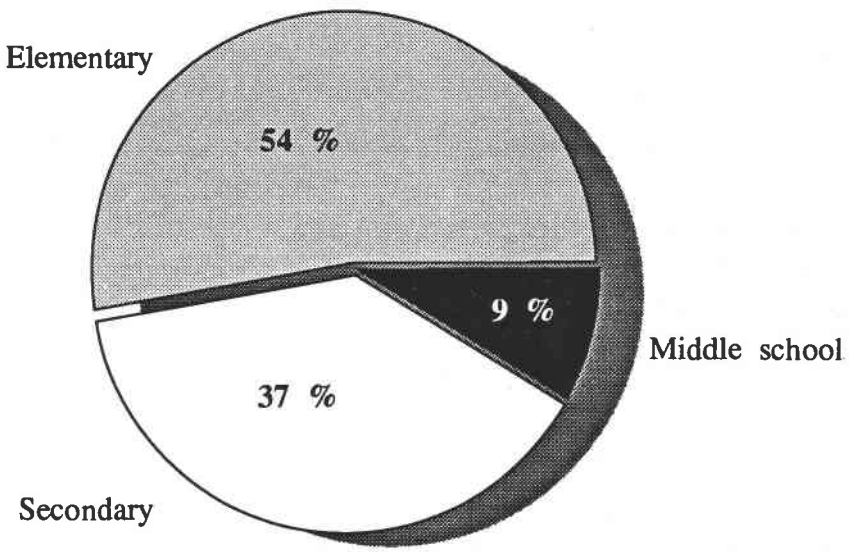

Figure 1. Teaching levels of sample. (n = 426)

Of these 426 teachers, 93, or 21.8%, were male and 333, or 78.2%, were female with an age range from 25 to 64 and a mean age of 42.51 years. Of this sample, 377, or 88.5% were employed as full time special education teachers; 49, or 11.5%, were employed as part-time special education teachers. In the case of both full time and part-time teachers, the majority provide service through one of the traditional service delivery models, as illustrated in table 1, below.

Table 1

Number of Teachers by Full and Part-time Using Each Service Delivery Model (n = 425)

Service Delivery Model	Number of Teachers Full Time	Part-time
Traditional		
# of teachers	304	43
% of teachers	80.9%	89.6%
Non-traditional		
# of teachers	73	5
% of teachers	19.1%	10.4%
Totals:	377	48

Reported experience teaching in the area of special education was, with the exception of beginning teachers, fairly evenly distributed, as shown in figure 2.

Generally, the level of specialized training was high, with 69.2% reporting having Standard Handicapped Learner endorsements and only 30.8% holding Basic endorsements. The predominant service delivery model for the total sample is the building resource and consulting model. Table 2 presents the frequency distribution of specific service delivery models for full time and part-time respondents.

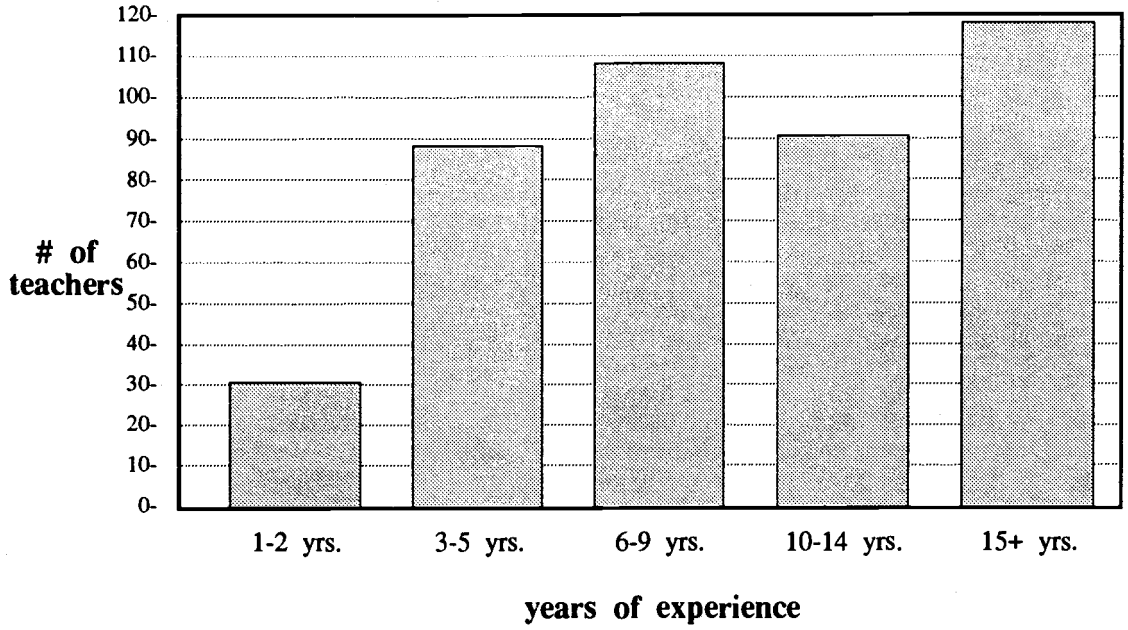

Figure 2. Distribution of experience for total sample. (n = 426)

Table 2

Frequency Distribution for Type of Service Delivery (n = 424)

Specific Model	Number of Teachers Full Time	Part Time
Building Resource Room		
# of teachers	39	6
percent of teachers	10.4%	12.5%
Building Resource & Consulting		
# of teachers	260	37
percent of teachers	69.1%	77.1%
Itinerant		
# of teachers	5	
percent of teachers	1.3%	
Day/Residential Treatment		
# of teachers	4	
percent of teachers	1.1%	
Other Models		
# of teachers	68	5
percent of teachers	18.1%	10.4%

The mean STR for the entire sample (n = 426) was 32.3, with a median of 30. The minimum reported was 2, the maximum 109, and the range was 107. The mean STR for the full time traditional group (n = 304) was 36.4, with a median of 34. The minimum reported was 9, the maximum 90, and the range was 81. The smallest STRs were reported by full time non-traditional teachers with a mean of 19.2 and a median of 13.5.

The mean caseload for the entire sample was 27.6, with a median of 27. The minimum reported was 0, the maximum was 100, and the range was 100. The mean caseload for the full-time traditional group was 31.5, with a median of 30. The minimum reported was 0, and the maximum reported was 83, and the range was 83. The smallest caseloads were reported by the full-time non-traditional group with a mean of 15.2, and a median of 12. The minimum reported was 0, and the maximum was 100. The range for this group was 100. The caseloads for each group are graphically represented in figure 3.

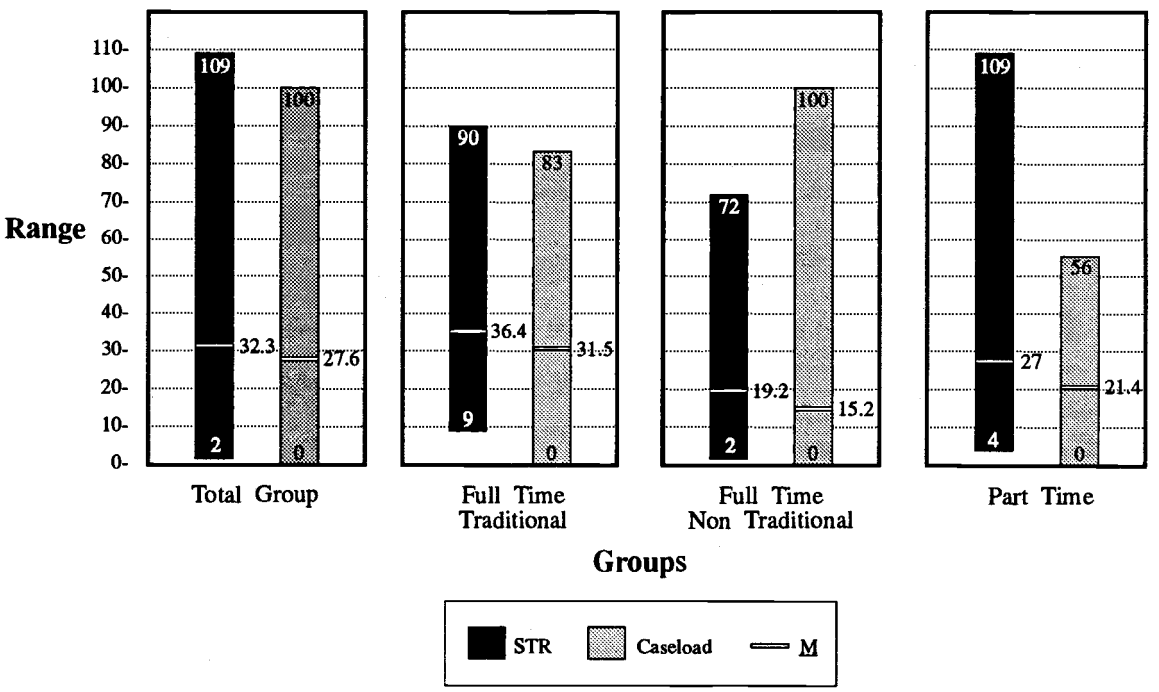

Figure 3. The Ranges and Mean STRs and Caseloads for Each Group Examined. (n = 423)

The maximum caseloads recommended by the sample ranged from ten or less, to a maximum of thirty. Instructional assistant time was not factored into this item. The most frequently identified maximum caseload size was 21-25. These recommendations are displayed in figure 4.

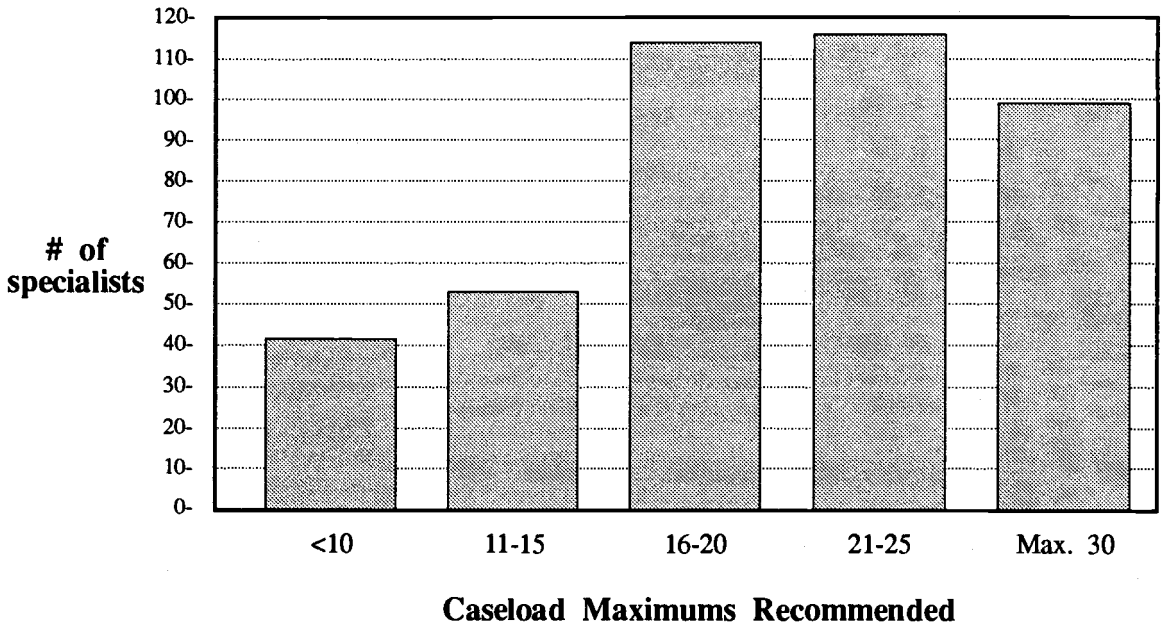

Figure 4. The Numbers of Teachers Who Recommended Various Caseload Maximums. (n = 424).

The burnout survey data were examined for frequency distribution on each of the three factors. Table 3 presents the frequency distribution for each factor for the entire sample.

Table 3

Burnout Frequency Distribution for All Respondents (n = 423)

Burnout Factor	Reported levels low	ave.	high
Emotional Exhaustion			
number of teachers	100	132	191
% of total group	24	31	45
Depersonalization			
number of teachers	263	122	38
% of total group	62	29	9
*Personal Accomplishment			
number of teachers	34	115	274
% of total group	8	27	65

(* High scores for this factor reflect a high level of personal accomplishment).

Seventy-two percent of the respondents who returned completed burnout surveys were full-time traditional teachers. Of these, 144 reported high levels of emotional exhaustion. Thirty-one reported high levels of depersonalization, and 25 reported low levels of personal accomplishment. The burnout factor frequency distribution for this group is shown in table 4.

Table 4

Burnout Frequency Distribution for Full-time Traditional Teachers (n = 303)

Burnout Factor	Number of Teachers by Degree of Intensity. low	ave.	high
Emotional Exhaustion			
number of teachers	70	89	144
% of total group	23.1	29.4	47.5
Depersonalization			
number of teachers	185	87	31
% of total group	61.1	28.7	10.2
*Personal Accomplishment			
number of teachers	25	87	191
% of total group	8.3	28.7	63

(* High scores for this factor represent a high level of personal accomplishment).

The full-time traditional group reported more teachers having high levels of emotional exhaustion and depersonalization, and a lower sense of personal accomplishment than any of the other groups examined.

Discussion of the Major Hypothesis

The major hypothesis for this study, that large class size, or STR, and caseloads are major contributing factors to teacher perceptions of low job success and satisfaction, and to feelings of emotional exhaustion, depersonalization and low professional accomplishment [burnout], was examined using ten hypotheses.

The ten hypotheses examined in the study were:

1. The higher the STR, the lower the feelings of job success,
2. the higher the STR, the lower the feelings of job satisfaction,
3. the higher the STR, the greater the reported feelings of emotional exhaustion,
4. the higher the STR, the greater the reported feelings of depersonalization,
5. the higher the STR, the lower the reported feelings of personal accomplishment, and
6. the higher the caseload, the lower the feeling of job success,
7. the higher the caseload, the lower the feeling of job satisfaction,
8. the higher the caseload, the greater the reported feelings of emotional exhaustion,
9. the higher the caseload, the greater the reported feelings of depersonalization, and
10. the greater the caseload, the lower the reported feelings of personal accomplishment.

A one-way analysis of variance (ANOVA) was used to examine the data for hypotheses 1 and 2, and 6 and 7. Bi-variate correlational analyses, utilizing the Pearson product moment correlation coefficient (r) was used to examine hypotheses 3, 4 and 5, and 8, 9 and 10, for significant relationships between variables. A significance level of .05 was adopted for each statistical measure. The results of the analyses follow.

The relationship between (1) STR and specialists' feelings of success; and, the relationship between (2) STR and specialists' feeling of satisfaction were examined using a one-way analysis of variance, with the independent variables of success and satisfaction treated as ordinal data, having a range of 1 - 5.

The data analysis revealed statistically significant relationships between STR and feelings of success (.01) and feelings of satisfaction (.05) for the full-time traditional group. For this group, hypotheses 1 and 2 were affirmed. Table 5 presents a summary of the ANOVA results for each independent variable.

Table 5

One-Way ANOVA Summary STR by Success and Satisfaction

Group	Success	Satisfaction
Total Sample	p = .0644	p = .2204
Full-time Traditional	p = .0019**	p = .0486*
Full-time Non-traditional	p = .4889	p = .9741
Part-time	p = .8534	p = .1185

(* = significant at .05 level of confidence; ** = significant at .01 level of confidence).

In regard to (3) STR and emotional exhaustion (EE), the data revealed statistically significant relationships between STR and EE at .05, for both the total sample and the full-time traditional group. For these groups, hypothesis #3 was affirmed. Table 6 summarizes this data.

Table 6

Correlations - STR/Emotional Exhaustion

Group	Emotional Exhaustion
Total Sample	r = .1096 p = .012*
Full-time Traditional	r = -.7785 p = .020*
Full-time Non-traditional	r = .1650 p = .084
Part-time	r = .0966 p = .255

(*= significant at .05 level of confidence)

In regard to (4), STR and depersonalization (DP), and (5) STR and personal accomplishment (PA), no significant relationships were found. Hypotheses #4 and #5 were denied.

The relationship between (6) caseload and specialists' feelings of success; and the relationship between (7) caseload and specialists' feelings of satisfaction were examined using a one-way analysis of variance, with the independent variables of success and satisfaction treated as ordinal data, having a range of 1 - 5.

The data analysis revealed statistically significant relationships between caseload and specialists' feelings of success (.05) and specialists' feelings of satisfaction (.05) for the part-time group only. For this group, hypotheses 6 and 7 were affirmed. Table 7 presents a summary of the ANOVA results for each independent variable.

Table 7

One-Way ANOVA Summary of Caseload by Success and Satisfaction

Group	Success	Satisfaction
Total Sample	p = .8070	p = .3297
Full-time Traditional	p = .4491	p = .1665
Full-time Non-traditional	p = .6124	p = .9413
Part-time	p = .0354*	p = .0161*

(*= significant at .05 level of confidence)

In regard to (8) caseload and EE, significant relationships at .05 were found for both the full-time non-traditional and part-time groups. A significant relationship at .01 was found for the total sample. Hypothesis 8 was affirmed for these groups. Although hypothesis 8 was denied for the full- time traditional group, it had a confidence level of .058, making it very close to a statistically significant relationship. Table 8 summarizes this data.

Table 8

Correlations - Caseload/Emotional Exhaustion

Group	Emotional Exhaustion
Total Sample	r = .121 p = .003**
Full-time Traditional	r = .091 p = .058
Full-time Non-traditional	r = .204 p = .053*
Part-time	r = .276 p = .029*

(*= significant at .05 level of confidence; **= significant at .01 level of confidence)

In regard to (9) caseload and DP, and (10) caseload and PA, no significant relationships were found for any group. Hypotheses 9 and 10 were denied.

Table 9

Hypotheses Affirmed and Denied for Each Group

Hypothesis One - Ten	TOTAL	Group FTT	FTNT	PT
1. STR:Success	D	A	D	D
2. STR:Satisfaction	D	A	D	D
3. STR:EE	D	A	D	D
4. STR:DP	D	D	D	D
5. STR:PA	D	D	D	D
6. Caseload:Success	D	D	D	A
7. Caseload:Satisfaction	D	D	D	A
8. Caseload:EE	A	D	A	A
9. Caseload:DP	D	D	D	D
10. Caseload:PA	D	D	D	D

(A = Hypothesis affirmed; D = Hypothesis denied)

Qualitative Data Analysis

During the interview process, several impressions and themes were noted by the researcher. The strongest impression was the marked difference between the high-burnout and low-burnout teachers regarding the feelings they expressed about their jobs.

The high-burnout, low success and satisfaction teachers generally seemed emotionally "down." They expressed feelings of disappointment, frustration, weariness and alienation.

For example;

> **Disappointed** I have a long-time friend who went into education the same time I did, only she has been a kindergarten teacher all these years. She's been keeping up on everything, portfolios, evaluations, cooperative learning, everything. She is so excited about her job that she doesn't know if she's

going to retire in three years. I'll tell you, when we were talking on the phone, I just could hardly stand it. I just about broke down and cried. I was really glad she felt the way she did, but I know a lot of people who do not feel that way. It's just one more thing to have to deal with, along with a whole lot more difficult kids.

Frustrated For instance, when we were making placement decisions for next year for some difficult kids, some of the staff members by-passed the chain of command and went directly to the superintendent and had the top level decisions made without my input . . . even consulting me. You stand, for years, breaking your back, working with kids . . . try to move them from one grade level to the next, and they are just shot out from under you.

I think probably my worst, my absolute worst thing comes down to District policy. Because I haven't really jumped up and down, screamed and hollered and complained, but I have asked for some help and they just look me in the face and go, "so?" We are in a small community and everybody that is an administrator is somebody's brother, so you can't get anywhere.

Tired I used to feel like I could send my LD kids on . . . and feel pretty good that they were going to be fairly successful. At this point I barely have the energy to even think about it . . . I have a 45 minute drive home and it takes me a good 45 minutes every evening to kind of let go of some of that [not doing the right thing by all students]. To literally have to go minute by minute and hour by hour to find some things that I know I have impacted in a positive way. Right now it's really hard to find.

Alienated When I have tried to do things like have inservices [for staff] or promote things related to Special Ed., that has not been allowed, so I haven't been allowed to come across in a way -- I haven't been supported as being someone with something valuable to offer.

The low-burnout, high success and satisfaction teachers seemed to be more "upbeat," and positive:

Satisfied I love children . . . and I'm never bored. I'm a "ham" when I teach and I love it.

Fulfilled I really enjoy what I'm doing and I am committed to what I am doing. I'm hoping that by the time I reach 60 or 70 I will continue to feel like I do now.

> **Energetic** I really feel good when I walk into that building. I've had jobs where when I would drive to work I would sort of have a dread of getting there and I really don't feel that now. I usually don't have many breaks, but if I am working with kids, that's OK.
>
> **Validated** My staff really supports me on what I am doing, and that doesn't always happen, I know, in some buildings where you are kind of considered, "Oh, you just have these little groups of kids who work," this kind of thing. I have never felt that way, that I'm a second class teacher. . .
> .

A second impression was that these teachers had a wide range of abilities to articulate ideas and make generalizations. This was particularly noticeable in the low-burnout group. Only 60% of these teachers were very able to make generalizations and articulate their ideas. The other 40% of these teachers were somewhat inarticulate. The interviewer found it very difficult to follow their thoughts and ideas as they spoke. Even when the researcher paraphrased what had been said, as a check for understanding, their meaning was often still unclear.

The low-burnout, high success and satisfaction group seemed to expect respect and felt they had the respect of their fellow teachers and administrators; they all voiced the perception that they communicated effectively with the other building staff. Sixty percent of these teachers described how they actively sought out others and wanted to work collaboratively with others in their buildings. The remaining 40% in this group expressed satisfaction with working independently, outside the perimeters of regular education, keeping others apprised of what they were doing at their own discretion. Interestingly, these were the same teachers who had difficulty expressing their ideas and making generalizations.

All teachers in this group expressed the perception that they were well-organized, were able to establish priorities regarding what they need to do first, second, and so on, and were in control of their time. All but one of these teachers noted that they do the required paperwork on their own time. They viewed this as a conscious choice they made

in order to balance their activities, maintain control of their time and provide good instruction for their students.

The high-burnout, low success and satisfaction group quite uniformly expressed frustration that the required paperwork was excessive and disallowed them to work with children. They also expressed a general perception that the "bureaucracy" demanded paperwork, not teaching; that administrators had little concern about student needs or success, but had as priorities protecting the district, placating other staff, the Federal government and the public, and having all paperwork in order in the event of an audit. As a group, these teachers all expressed feelings of being unappreciated, devalued as professionals, thwarted in areas of communication and participation, and sometimes being rejected as a peer by either their administrators and/or the building staff.

In all ten interviews were three major, common themes. These were reiterated throughout the written comments accompanying the surveys:

1. Teaching students and meeting individual student needs were the primary concerns of these special educators. Related, required paperwork, meetings and other activities interfered with the teacher's ability to work directly with the students, whom they viewed as their first priority.

2. Teachers reported increasing numbers of students with diverse, multiple and severe educational and emotional needs among their classes and caseloads. These were often students who require one-to-one attention for both educational and safety reasons. At the same time, resources for addressing these special needs were either static or low and dwindling.

3. Teachers expressed very serious concerns about these situations and felt that something should be done formally to address these situations. The most commonly recommended "solutions" to the situations, within the interviews and the written comments, were the need to reduce paperwork and limit STRs and caseloads. Most of the respondents who made these comments indicated that these solutions needed to be implemented at a state level through legislation.

SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Summary

Within the last decade there has been an increase in research on the topics of special education teacher satisfaction, stress and burnout. This increase in research is due in part, to increasing rates of teacher attrition (Smith-Davis & Cohen, 1989), and other research which shows that the overall teacher attrition rate is higher in special education than in general education (Lauritzen, 1988), and that attrition caused by isolation, stress, burnout and related factors is elevated among special educators (Chandler, 1983; Fimian & Blanton, 1986; Fimian & Santoro, 1983). The increasing numbers and needs of students identified as having mild disabilities, and the increasing teacher attrition rates raise serious questions regarding how special education will continue to meet educational needs of students with mild disabilities.

Those in the field recognize that demands for special education services are increasing while resources are dwindling. In Oregon, for example, because of Ballot Measure Five, the State 1993-95 budget for education will be cut by 10% This translates to equivalent reductions in both public school district budgets and teacher training programs. Eleven years ago, Begley (1982), noted that the responsibility of providing adequate and appropriate educational services to students with disabilities was being affected by increasingly inadequate budgets. This, in turn, increased workloads and pressures on special education teachers. This situation has not changed, and is even more severe today.

Special education teacher attrition, and deep cuts in college and university special education training programs portend a potential crisis for special education in Oregon public schools. Competent, experienced and well trained special educators are becoming a

scarce commodity on the " market," while the numbers of identified students with mild disabilities continue to increase.

One of the resultant implications is the need to isolate factors which contribute to teacher burnout, lack of perceived job success or efficacy, and lack of teacher satisfaction, and to determine ways these might be diminished, in order to reduce teacher attrition.

This study hypothesized that large student-teacher ratios and/or caseloads were major contributing factors to teachers' perceptions of low success and low satisfaction, and strong feelings of burnout. Further, it hypothesized that there would be strong relationships between these variables. It was expected that teachers were more likely to report low perceptions of success and satisfaction and high levels of burnout when they had large STRs, and/or caseloads; and, conversely, teachers were more likely to report high perceptions of success and satisfaction and low levels of burnout when they had smaller STRs, and/or caseloads.

The sample (n = 426) used in this study was selected from among all teachers of children with mild disabilities (N = 1437) currently employed in Oregon. The sample represented a cross-section of full-time and part-time specialists from elementary, middle, and high schools. The sample was comprised predominantly of women, with only 93, or 21.8%, being male. The sample had a mean age of 42.5, and a mean level of special education teaching experience of 10.4 years. The majority of teachers in the sample were highly trained. Over 69% of these specialists held Standard Handicapped Learner Endorsements.

The instruments used to collect the demographic data and the data regarding success and satisfaction and burnout, were the Oregon Caseload Survey, developed by this researcher, and the Maslach Burnout Inventory - Form Ed. The instruments used to collect the qualitative data were the comments section of the Oregon Caseload Survey, and the structured interview guide developed by this researcher.

The data analyses revealed interesting differences in both STRs and caseloads, between the total sample and the three sub-groups examined.

The total sample (n = 426) had a mean STR of 32.3, with a minimum of 2 and a maximum of 109. The full-time traditional group (n = 304) had the highest mean STR, 36.3, with a minimum of 9 and a maximum of 90. The other two groups, full-time non-traditional, and part-time, had mean STRs of 19.2 and 27, respectively.

In regard to caseloads, the total sample (n = 426) had a mean caseload of 27.6, with a minimum of 0, and a maximum of 100. The full-time traditional group (n = 304) had a mean caseload of 31.5, with a minimum of 0 and a maximum of 83. The other two groups, full-time non-traditional (n = 73), and part-time (n = 49), had mean caseloads of 15.2 and 21.4, respectively. The caseload means for the total sample and the full-time traditional group exceeded the mean caseload maximum of 20.98 which was recommended by the total sample (n = 424) by 32 and 50 percent, respectively.

Statistically significant relationships were found between STRs and feelings of success and satisfaction for the full-time traditional group. Significant relationships were also observed between caseload size and feelings of success and satisfaction for the part-time group.

The relationships observed between STRs and the three discrete burnout factors measured by the Maslach Burnout Inventory varied for the total sample. A significant relationship between STRs and emotional exhaustion (p = .012) was observed, while no significant relationships between STRs and either depersonalization or professional accomplishment were evident.

The relationships observed for the total sample between caseload and emotional exhaustion, depersonalization and professional accomplishment, mirrored those observed for the STR. There was a significant relationship between caseload and emotional exhaustion, while no significant relationships were observed between caseload and depersonal-

ization or professional accomplishment.

The strongest correlation for the total sample was between caseload and emotional exhaustion ($r = .12$, $p = <.01$). STR was also significantly correlated to emotional exhaustion ($r = .11$, $p = .012$).

When the data from the total sample were grouped and analyzed for the three sub-groups of full-time traditional, full-time non-traditional, and part-time, some different relationships were observed.

Within the full-time traditional group, a significant relationship was observed between STR and emotional exhaustion ($r = .12$, $p = .02$) and depersonalization ($r = .10$, $p = .04$), while no significant relationships were observed between caseload and either emotional exhaustion, depersonalization or professional accomplishment (although, the p value of .058 for the relationship between caseload and emotional exhaustion was very close to significant at a .95 level of confidence).

Data for the full-time non-traditional sub-group presented no significant relationships between STRs or caseload and feelings of success and satisfaction. The part-time group, however, did have a significant relationship between caseload and success ($p = .035$) and satisfaction ($p = .016$).

Significant inverse relationships were observed in both the full-time non-traditional and part-time groups between caseload and emotional exhaustion, with the strongest correlation being between caseload and emotional exhaustion for the part-time group.

The analysis of interview data indicated that in addition to STR and caseload size, the quality of administrative leadership and support, and the level of staff support strongly influenced both feelings of success and satisfaction and levels of emotional exhaustion. The presence or lack of role conflict and ambiguity, and individual time management skills also strongly impacted these variables.

Through the statistical testing of the hypotheses, and reviewing the data collected by

interviewing participants who scored the highest and the lowest on burnout factors and the data on levels of success and satisfaction, five basic conclusions have emerged.

Conclusions

Conclusion #1

The findings of this study support the findings from previous studies of different designs that large STRs and caseload size do contribute to teacher reports of feelings of lack of lack of success and satisfaction and high levels of emotional exhaustion which contribute to burnout.

The strongest relationships observed in this study were those relating to STRs and caseload size and feelings of success and satisfaction and emotional exhaustion.

This supports Bensky's et al. (1980), finding that STR was the most stressful job factor for self-contained classroom teachers, and resource room teachers ranked it as the second most stressful factor related to their jobs.

While significant at least at a .05 level, the statistically significant correlations in and of themselves were not strong correlations. This leads to conclusion #2, that there may be other interacting factors of equal strength or importance which impact perceived feelings of success and satisfaction and emotional exhaustion.

Conclusion #2

The variance within the quantitative data and the information from the personal interviews indicate that there are other equally important variables which tend to interact to impact teacher perceptions of success and satisfaction and burnout.

In addition to the variables of administrative leadership and staff support, role conflict

and ambiguity, and control of paperwork and time, several interview responses suggested that uniquely personal variables, such as family obligations and support, job security, psychological makeup, and personal philosophies also contributed to teachers' perceptions of job satisfaction, success and feelings of burnout.

The interview and written comments contained many allusions to situations which were definitely influenced by that individual's locus of control. While an "internal" or "external" locus of control cannot change the facts of a situation, i.e. the amount of required paperwork or number of students, it does influence one's attitudes and feelings regarding one's abilities to deal with the situation. The more "internal" person tends to feel competent and able to manage and control situations, and maintain a positive outlook. The more "external" person tends to feel incapable of dealing with situations, "put upon," and defeated when confronted with difficult situations.

This is congruent with the observation by (Jones, 1987) that "predispositional factors may also contribute to teacher burnout." Hudson and Meaghers' study (1983) also supports this conclusion. They reported that teachers considered to be at or near burnout were "more vulnerable to stress-related problems, more externally controlled . . . and were more prone to react negatively when under stress." Further, Hudson and Meagher found that women teachers' stress levels and job satisfaction were significantly impacted by personal and family responsibilities, such as child care, and homemaking.

Conclusion #3

Teachers tend to separate feelings of success and personal accomplishment from feelings of satisfaction, emotional exhaustion and depersonalization. This is consistent with findings from other studies, and may be related to Corbitt's (1989) finding that "special education teachers hold a high opinion of their personal teaching efficacy and a low opinion of teaching in general." Farber (1984) reported that teachers who are burned

out still "cling tenaciously to their sense of self-esteem." Prawat (1983) reported that teachers tend to focus on and express more pride in their successes than guilt from their failures, which may help explain why teachers are able to view themselves as successful, and yet be dissatisfied and relatively burned out.

Put in terms of teaching efficacy theory, many of the special educators in this sample seem to have a low sense of general teaching efficacy, and a high sense of personal teaching efficacy. This might be explained by the fact that students with disabilities have difficulty learning and tend to learn at a slower rate than students without disabilities. This has not only the potential of contributing to teacher stress (McDaniel & DiBella-McCarthy, 1989) but also to a diminished sense of general teaching efficacy.

Conclusion #4

The data from this study suggested that, although many relationships existed at the .01 and .05 levels between STRs and/or caseloads and the independent variables of low success and satisfaction, and burnout, other factors needed to be considered. Throughout the interviews, and reiterated in the written comments, STR and caseload sizes, were regarded as stressful and problematic. This was due to the related paperwork and other activities required by law, for each student. However, it appeared that it wasn't until other stressors, such as lack of administrative leadership and support and role conflict and ambiguity, were added to the "mix," that strong feelings of low success and satisfaction and teacher burnout occurred.

Conclusion #5

Both the data from this study, and previous, differently structured studies imply that there were no simple, singular reasons for the instances of lack of teacher satisfaction, and

lack of feelings of success, and teacher burnout. Still, the fact that 191, or 45% of the total sample reported high levels of emotional exhaustion, and 190, or 44.6%, reported feeling "not successful," "minimally successful" or "somewhat successful;" and 184, or 43%, reported feeling "very unsatisfied," "unsatisfied" or "somewhat satisfied," should be a real concern for school boards, administrators, legislators, teachers and parents. The numbers underscore the importance of clearly identifying the factors involved in creating these feelings and working to resolve those which can be addressed within the professional arena.

Conclusion #6.

Full-time traditional teachers reported higher levels of emotional exhaustion than the other two groups. This was due to the differences in STRs, caseloads, and service delivery models. The FTNT group tended to have small STRs and caseloads, often in a self-contained setting. This service delivery model is highly structured, creating a less complex teaching situation and fewer required interactions with other personnel.

Recommendations

Recommendations for Practitioners

Recommendation #1

Local education agencies should develop and implement relevant staff and administrative inservice programs. Strongly implied throughout the data from this study is the need for ongoing inservice programs for special education teachers in areas of communi-

cation to enhance administrative and staff support, time management techniques, job role clarification and stress reduction techniques. These inservice programs would all address the locus of control issues which strongly impacted teachers' perceptions of success, satisfaction and burnout. Further, based on interview and survey comments, principals and other administrators would benefit from leadership training in special education. Johnson, (1991) stated,

> . . . principals who view relationships between themselves and their teachers as static and autocratic will have little success, over the long haul, in getting teachers to support, work for, and sacrifice for a common vision.
> . . . the fragile nature of the authority relationship between principals and teachers . . . suggests the importance of a transformational type of leadership reflected in principal responsiveness to teacher values, needs and interests as the basis for an authority relationship . . . .

Recommendation #2

Local school officials should determine an appropriate STR and caseload, and limit these in a consistent and systematic manner. This recommendation is based on the chain of causation related to STRs and caseload size. Large STRs and/or caseloads entail large amounts of teacher time and energy for activities other than the job of teaching or consulting. Assessment and evaluation, IEPs and IEP meetings, MDT meetings, due process paperwork, and educational staffings all impact the teacher's time, energy, and enthusiasm. In addition, the time entailed in teaching students who have more severe problems and multiple needs increases demands on teacher time at a rate that appears geometrically proportionate to the severity of those problems and needs. The resulting recommendation is that STRs and caseloads be limited to numbers which make the overall job of the specialist manageable.

Recommendation #3

Clerical assistants should be provided and trained to process the paperwork related to the identification and placement of, and service delivery to students with mild disabilities.

This clerical assistant should schedule meetings, "track" and file paperwork, and attend to all other related, clerical activities. This would not only relieve some of the time constraints currently suffered by specialists, but would be far more cost-effective in terms of fiscal resources. This model is consistent with those used by other professional groups, such as lawyers and doctors.

Recommendation for Teacher Training Programs

Teacher training programs should include components which specifically address time management techniques; what to expect in terms of time constraints and stressors on the job; and communication and assertiveness training. If new teachers enter the field "forewarned and forearmed," they will be much more likely to feel and be successful, satisfied, and not so vulnerable to burnout.

Recomendation for State Officials

The State should develop STR and caseload "caps." These need to be developed at the state government level, both in Oregon and nationally. Some more forward-looking states, such as California and Pennsylvania, have already addressed the issues of special education STR and caseload "caps," through state law and administrative rules. States which choose to disregard these issues in the name of economy will, in the long run, find they have been "penny wise and pound foolish."

Recommendations for Future Research

Recommendation #1

A study should be conducted which describes what other states are doing and have done about special education STR and caseload maximums. This will provide helpful

information for those state level administrators and legislators as they address these issues in Oregon and other states.

Recommendation #2

A mega-analysis of research should be conducted on "weighting" as it applies to determining appropriate STRs and caseloads. This research should include what has been done with the concept of "weighting" various disabilities and needs for both regular and special education settings. This research should particularly address the issue of "weighting" in conjunction with the implementation of "full inclusion" models of service delivery. As all students with disabilities are included in regular education classrooms, the potential for "overload" for both the regular education and special education teacher increases dramatically if some consideration, in terms of "weighting" is not given.

Recommendation #3

A study should be conducted to examine how instructional aide time alters the impact of STRs and caseloads. This should include gathering information to help determine how instructional assistant time might be "weighted" in regard to STR and caseload maximums.

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APPENDICES

APPENDIX A

COVER LETTER SENT WITH SURVEY BATTTERY TO ALL TEACHERS INCLUDED IN THE SAMPLE

4516 River Road S.
Salem, Oregon 97302

January 29, 1993

Dear Colleague,

Information gathered from a recent, informal, "sampling" of Oregon special education teachers suggests that class sizes and teacher caseloads of mildly disabled students are increasing significantly, and include ever more challenging students. In addition, legally mandated procedures and paperwork are also ever increasing. There was agreement among those sampled that these are serious issues of concern. The following survey questionnaire was developed to provide an accurate description of existing special education mildly handicapped caseloads throughout the state. I am conducting this study in collaboration with Oregon ACLD, Inc. The data collected will be used by ACLD as a basis for approaching the Oregon Legislature with a proposal for legally mandated class size/caseload maximums. In addition I will use the data to fulfill a requirement of my doctoral degree program.

You are one of 800 randomly selected Oregon teachers of the mildly disabled who are being asked to share class size and caseload information for this project. In order that the results will truly represent all Oregon teachers of the mildly disabled, it is important that each questionnaire be completed and returned.

You may be assured of complete confidentiality. The questionnaire has an identification number for mailing purposes only. This is so we may check your name off the mailing list when your questionnaire is returned. The demographic data will be used for statistical purposes only. Your name, address and telephone number are included so we can contact you promptly if there is any item about which we need further information, or for any kind of follow-up information we may need. You as a respondent will in no way be personally identified with this study. Your responses will be held in strictest confidence, and used only as part if the statistical data.

The results of this research will be made available to Oregon ACLD, Inc., as discussed above, and to all interested educators. You may receive a summary of the results by noting your request in the demographics section in the space provided.

Please complete the questionnaire and return it to us in the enclosed, stamped self-addressed envelope.

I would be most happy to answer any questions you might have. Please write or call. The telephone number is (503) 363-4329.

Thank you for your assistance.

Sincerely,

Sandra M. McDow

APPENDIX B

1993 OREGON CASELOAD SURVEY

1993 OREGON CASELOAD SURVEY

DEFINITIONS:

CASELOAD is defined as the number of students for whom you are **case manager** (*totally responsible*) — including annual reviews, 3-year evaluations, IEPs, and all other related paper work and activities in addition to teaching.

SLD = Specific Learning Disabilities; **EMR** = Educable Mentally Retarded; **SED** = Seriously Emotionally Disturbed.

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1. **How many years have you worked as a special education teacher?** (circle response)

   a. 1-2 YEARS
   b. 3-5 YEARS
   c. 6-9 YEARS
   d. 10-14 YEARS
   e. 15 OR MORE YEARS

2. **How many students do you think should be a maximum caseload?** (circle response)

   a. 10 OR LESS
   b. 11-15
   c. 16-20
   d. 21-25
   e. 30 MAXIMUM

3. **Please rate your feelings of success as a special education teacher:** (circle response)

   a. NOT SUCCESSFUL
   b. MINIMALLY SUCCESSFUL
   c. SOMEWHAT SUCCESSFUL
   d. VERY SUCCESSFUL
   e. HIGHLY SUCCESSFUL

4. **Please rate your job satisfaction:** (circle response)

   a. VERY UNSATISFIED
   b. UNSATISFIED
   c. SOMEWHAT SATISFIED
   d. SATISFIED
   e. VERY SATISFIED

5. Service Delivery Model — choose the one statement that most closely describes your service delivery model. (circle response)

a. BUILDING RESOURCE ROOM (provides daily, regularly scheduled instruction in the resource room only — does not entail consulting — instruction may be 1-1, or group)
b. BUILDING RESOURCE AND CONSULTING (provides daily, regularly scheduled in struction in the resource room and/or special, modified instruction in the regular classroom or consultation with regular education teachers).
c. ITINERANT, PULL OUT PROGRAM (Serves students in two or more buildings, at varying times and/or days, on a 1-1 basis.)
d. DAY OR RESIDENTIAL TREATMENT PROGRAM (serves a discrete population as determined by actions from outside agencies — such as secure treatment units, programs for adjudicated youth, etc.
e. OTHER (describe) _____

_____

6. Target population — service model is: (circle response)

a. CATEGORICAL (serves only those with certain specific disabilities)
b. NON-CATEGORICAL (serves those with various disabilities; service is based upon educational need or by virtue of placement due to external factors such as adjudication).

7. Grade levels of special education students you are responsible for in your present position. (circle response)

a. ELEMENTARY (k-6)
b. SECONDARY (7-12)

8. Types and numbers of students for whom you provide each of the following:

	A. DIRECT INSTRUCTION (**include** all students, you teach even if you are not case manager)	B. CONSULTING **ONLY** (**Do not include** students counted under "A")	C. CASE MANAGER (**include only** students you case manage — see page 1)
Type	number	number	number
a. SLD	_____	_____	_____
b. SED	_____	_____	_____
c. EMR	_____	_____	_____
d. other			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

9. **Average hours per week you spend providing direct instruction:** (circle response)

   a. 1-10
   b. 11-20
   c. 21-30
   d. 31-35

10. **Average total hours per week spent consulting with regular education teachers.** (circle response)

    a. 1-10
    b. 11-15
    c. 16-20
    d. 21-25
    e. 26 or more.

11. **Average hours per week spent performing case management tasks** — annual reviews, observations, 3-yr evaluations, parent conferences, tracking related paperwork, etc. (circle response)

    a. 1-5
    b. 6-10
    c. 11-15
    d. 16-20
    e. MORE THAN 20

12. **The district for which I work has:** (circle response)

    a. A GUIDELINE FOR DETERMINING MAXIMUM CASELOADS.
    b. MAXIMUM CASELOAD NUMBERS ESTABLISHED BY CONTRACT NEGOTIATION.
    c. A LEGALLY MANDATED CASELOAD NUMBER.
    d. NO MAXIMUM CASELOAD GUIDELINE OR MANDATED MAXIMUM CASELOAD.

13. **My caseload is determined by:** (circle response)

    a. THE NUMBER OF IDENTIFIED STUDENTS WITH DISABILITIES ENROLLED IN MY BUILDING AT ANY GIVEN TIME.
    b. THE NUMBER OF IDENTIFIED STUDENTS WITH DISABILITIES ASSIGNED TO ME BY THE BUILDING MULTI-DISCIPLINARY TEAM.
    c. DISTRICT GUIDELINES OR MAXIMUMS SET BY CONTRACT NEGOTIATIONS OR STATE LAW.
    d. OTHER (explain) _____

    _____

    _____

    _____

(For questions 14 - 18, circle yes or no at the end of each statement)

14. ARE YOU MULTI-DISCIPLINARY TEAM (MDT) COORDINATOR? **YES NO**

15. DO YOU CONDUCT INITIAL EVALUATIONS OF STUDENTS REFERRED FOR SUSPECTED DISABILITIES OF SLD, SED AND EMR ONLY? **YES NO**

16. DO YOU CONDUCT INITIAL EVALUATIONS OF ALL STUDENTS REFERRED FOR EVALUATION, REGARDLESS OF THE SUSPECTED DISABILITY? **YES NO**

17. DO YOU CONDUCT 3-YEAR REEVALUATIONS OF STUDENTS WITH MILD DISABILITIES (SLD, EMR, SED) ONLY? **YES NO**

18. DO YOU CONDUCT 3-YEAR REEVALUATIONS OF ALL IDENTIFIED STUDENTS WITH DISABILITIES, REGARDLESS OF DISABILITY CATEGORY? **YES NO**

19. **Approximate hours per week spent doing special education evaluations — include both testing and observations** (circle response)

a. 1-10
b. 11-15
c. 16-20
d. 21-25
e. MORE THAN 25

20. **Types of testing you do for special education evaluations:**

a. ACHIEVEMENT
b. IQ
c. PERCEPTUAL PROCESSING
d. BEHAVIORAL

21. **Please complete the following, *Educator's Survey* per directions given.**

DEMOGRAPHIC DATA

Name _____
last first

Sex _____ M _____ F Age _____ Home Address _____

_____

Telephone (____) _____ School _____ District _____

Position/job title _____

Certification - Handicapped Learner _____ basic _____ standard

Do you teach students with mild disabilities (SLD, EMR, SED)? ____ full time ____ part time.

If part-time, how many hours per week do you work exclusively as a special education teacher? _____

Thank you for taking time to complete this survey.

____ Check if you wish a summary of the results of this survey, and have enclosed a stamped, self-addressed envelope.

Have you any concerns or comments you would like to make about caseload issues? If so, please add them here.

_____

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APPENDIX C

FOLLOW-UP POSTCARD

Postcard Follow-up

January 22, 1993

Last week a questionnaire seeking information about your special education class sizes and caseload was mailed to you. Your name was drawn in a random sample of the more than 2,300 special education teachers of the mildly disabled in Oregon.

If you have already completed and returned it to us, please accept our sincere thanks. If not, please do so today.

Because it has been sent only to a representative sample of 800 Oregon teachers of the mildly handicapped, it is extremely important that yours also be included in the study if results are to accurately represent class sizes and caseloads of Oregon special education teachers.

If by some chance you did not receive the questionnaire, or it got misplaced, please call me right now, collect (503-363-4329) and I will get another one in the mail to you today.

Sincerely,

Sandra McDow

APPENDIX D

STRUCTURED INTERVIEW GUIDE

Open-ended Telephone Interview Questionnaire

(Except for the first general question, each question addresses one of the three areas identified through analysis of the written comments. The areas addressed are shown in parentheses after each question).

1. (a) You have a large caseload, yet you rate yourself as feeling satisfied and successful, and score low on the burnout scale. What do you think makes you able to cope so well and feel this way?

or

(b) You have a large caseload, and you rate yourself as feeling dissatisfied and unsuccessful, and score high on the burnout scale. What do you think it is about your job that makes you feel this way?

2. How do you view administrative and staff support of you and your program? (administrative leadership and support)

3. Within the building, who makes the decisions regarding your program and your responsibilities as a teacher? (administrative leadership and support; control of time and paperwork)

4. How would you describe administrative and staff expectations of you? (role conflict and ambiguity)

5. How do you feel about the communication within your building, among and between administration, staff, and yourself? (role conflict and ambiguity, administrative leadership and support)

6. How does your staff view you in your role as a specialist? (role conflict and ambiguity; administrative leadership and support)

7. As a specialist, what do you view as your highest priority, and your lowest priority? Are you able to address your priorities in that order? (role conflict and ambiguity; control of time and paperwork)

8. If you could change one thing about your job or program, what would it be? (all)