
Steps to Implementing Inclusive Education

Now that we have a common definition and a sense of what inclusive education looks like, let's talk about where to start in developing inclusive schools. Many districts have struggled with implementing inclusive education on a student by student basis, only to find that their own system of providing services for students with disabilities does not easily allow for the flexibility needed to provide the necessary supports and services in places other than "special classes." Others have found that the "inclusion program" was successful when certain personnel (principal, special education teacher, parent, etc.) were implementing it but that it fell apart when those personnel left.

The reason for the difficulties in both of these cases was lack of systemic support for an inclusive educational option. To effectively implement inclusive education as an option, it is necessary to examine policies, practices, and procedures already in place and plan for new policies and procedures to support the new service delivery option.

Ways for Districts and Schools to Examine Practices

Numerous needs assessments are available to assist districts and schools with this process. The District and School Level LRE Protocols (2000) developed by a CDE stakeholder group and now being piloted in several locations, provide excellent examples of research-based practices that will guide schools and districts in their self-improvement plans (see Appendix). CCIE developed two local level tools also included in the Appendix: a District-Level Needs Assessment (Halvorsen & Neary, 1996) and a School Site-Level Needs Assessment (Halvorsen & Neary, 1996). The first has been utilized with district stakeholder groups or Inclusion Task Forces in each of the 15 CCIE districts as both a planning (pre) and self-evaluation (post) tool. Each group uses a consensus-based process to determine which practices are being implemented at an excellent/satisfactory/unsatisfactory level or not at all, and which are areas of extensive/moderate/minimal/no need for assistance. This creates a basis on which action plans are developed and approved through the LEA process. A sample first year LEA plan resulting from this process is contained in Table 9 and contains strategies for evaluating and documenting outcomes.

A needs-based process to assist schools and districts with personalizing the first steps, adapting these to their local situation, and incorporating plans within existing School Site Plans, including plans for professional development follows.

To effectively implement inclusive education as an option, it is necessary to examine policies, practices, and procedures already in place and plan for new policies and procedures to support the new service delivery option.

District Level

The following process is helpful as districts begin to examine their practices to create improved educational options for students with disabilities in the Least Restrictive Environment.

- Step 1. Establish improvement team.
Form stakeholders workgroup or use existing team.
- Step 2. Conduct self-assessment using protocol.
Meet with team and review the needs assessment.
Rate practices based on evidence.
Identify need areas.
List any improvement strategies that come up during discussions.
- Step 3. Summarize using the summary sheet.
Average scores for each section and transfer this number to the summary sheet.
Summarize needs for section and list on summary sheet.
List any improvement strategies discussed on summary sheet.
- Step 4. Brainstorm solutions using SODA process.
For need areas where improvement activities have not been identified, brainstorm possible solutions using SODA process.
- Step 5. Develop Action Plan.
- Step 6. Select improvement activities and put into an Action Plan.
Implement Action Plan.

Figure 1, *First Steps in Implementing Inclusive Options*, is an effective process to use when beginning any change effort. The process is one that has been used successfully by districts as they began to implement inclusive education across their district. The forms and steps are described as part of an ongoing process to implement and refine inclusive educational practices. Table 4 outlines three phases of development for districts as they begin developing inclusive schools.

As you can see in Figure 1, a cross-constituency or stakeholder group/improvement team (Step 1) is a critical feature of the change process, and these working groups have been the most important catalyst in each of the districts with which we have worked. Their diverse expertise and perspectives ensure that a thoughtful planning process, including training, professional development, and ongoing support occur as inclusive options are initiated and expanded.

Table 4 is an expanded version of the process outlined in Figure 1. This version includes some specific actions to take at each step.

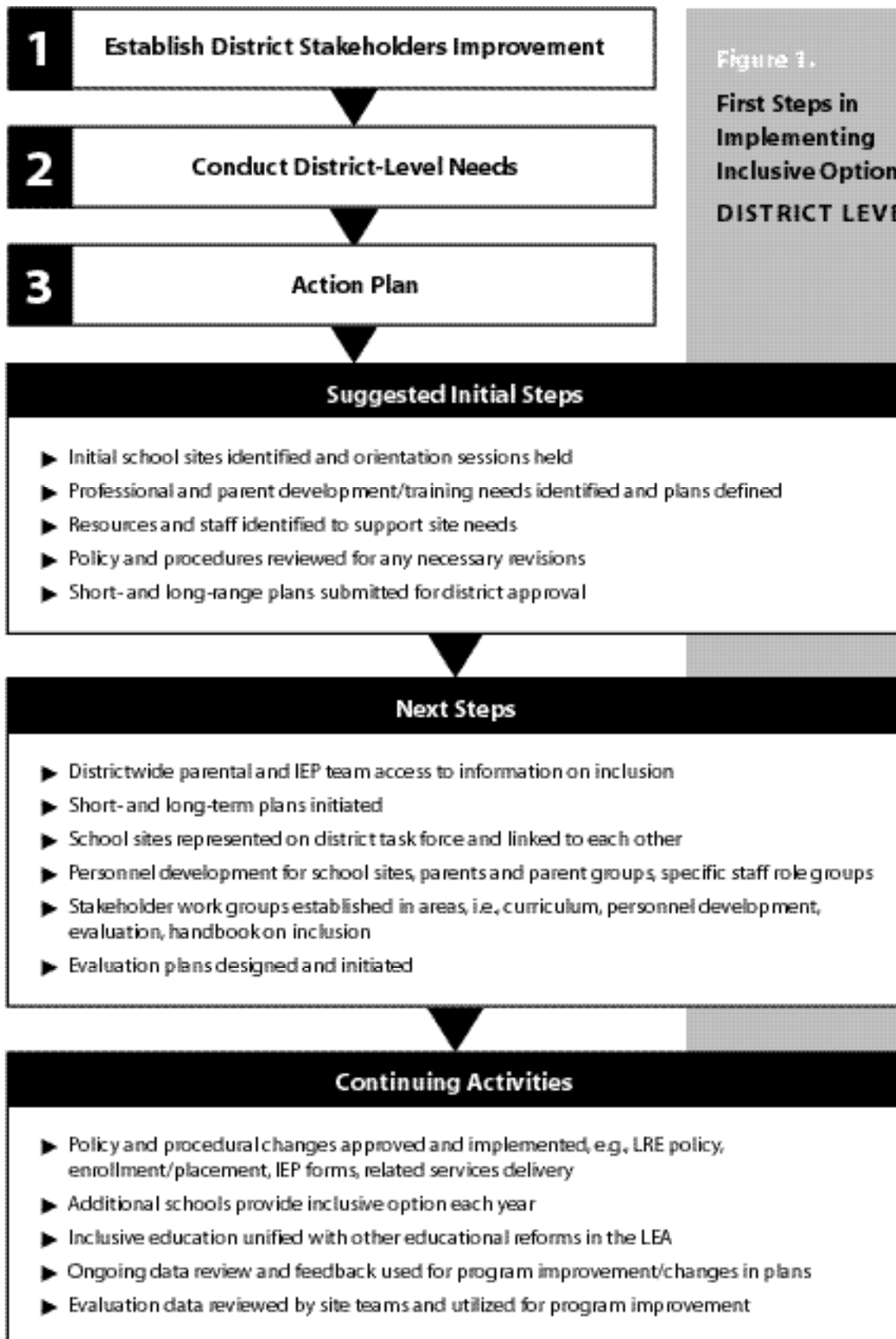


Figure 1.
First Steps in
Implementing
Inclusive Options:
DISTRICT LEVEL

Table 4: District-Level – First Steps

Phase 1: Year One

Superintendent charges district to form a **cross-constituency task force** (parents, educators, related services, administration, categorical programs across general and special education) that will examine the status of special education services in relationship to the least restrictive environment.

Task Force conducts **needs assessments** including **Quality Assurance Review** and makes recommendations for plans to facilitate school ownership of all students.

Stakeholder workgroups are formed to address key need areas (e.g., personnel development, service delivery, curriculum, policy and procedures).

Task Force meetings and plans are open, publicized and **disseminated widely** across the district on an ongoing basis, using both electronic (website) and in-person means (e.g., PTA, CAC, teacher and related services meetings, etc.).

Plans are approved through district protocol.

Initial cohort of school sites is selected based on, for example, 1) IEP requests for inclusive, home school placements, 2) interest of the school community, 3) representativeness (e.g., geographic), and 4) accessibility.

Orientation sessions are held for families and schools, and individual school planning processes are initiated.

Resources are identified to support site-level needs.

Phase 2: Year One-Two

Board of Education Policy on LRE is revised or expanded to reflect inclusive options/supported placement in general education.

IEP forms and processes are revised to conform to the 1997 IDEA requirements in relationship to, for example, general education participation in IEPs; general education placement with support; justification of any time out of general education; access to and progress in core curriculum; and participation in statewide assessments.

Personnel development objectives and timelines are implemented and activities are supported by resources, for example, stipends; child care; released time for coaching; visits; use of peer mentoring.

Any new **procedures**, i.e., for supervision of staff, or enrollment of students, are delineated in school and district handbooks for parents and staff.

School sites are assisted by the central office to examine their resources and consider innovative restructuring that will improve instruction for all students, for example, at the elementary level, one special educator serves grades K-2; one serves all in 3rd-5th or, special educators are assigned to teams and families within secondary schools and co-teach with general education in specific areas.

Phase 3: Year Two-Three

School communities design their site-level plans for becoming inclusive. This work occurs either in an existing stakeholder group, i.e., School Site Council (SSC), or a group convened for this purpose and in which the SSC, Student Study Team (SST), PTA and teachers' association are represented.

District initiates and supports tasks such as 1) **Workgroups** to write modification and accommodation practices to be incorporated into district frameworks and standards; 2) development of **strands** within all professional development activities that incorporate a full range of diversity in learners' styles and intelligence.

District designs ongoing **evaluation tools** to examine process and outcomes of education in inclusive schools.

STEP 1:

Establish a District Stakeholder Improvement Team

Working together as a team is at the heart of the inclusion process. Teams can be used at various levels within a district to support the development of inclusive practices. These levels include

- ▶ **Systems-level teams** that operate at the district (system) level and deal specifically with overall district issues and needs.
- ▶ **Building-level teams** that operate at the building (site) level and deal with site issues and needs.
- ▶ **Student-level teams** that operate at the classroom level around student needs.

The District Improvement Team is a systems-level team that is representative of all stakeholders who will be involved in or affected by the changes the team will recommend. Participants might include:

- ▶ district general and special education administrators
- ▶ SELPA or County Office of Education representatives
- ▶ parents
- ▶ site-level administrators
- ▶ general and special education teachers
- ▶ related service personnel
- ▶ paraprofessionals
- ▶ agency or organizations (PTA, CTA, etc.)

The team typically will meet one to two times a month to review district policies, practices, and procedures for their consistency with LRE requirements of Federal and State law as well as effective research-based practices. These meetings might include a combination of voluntary (after school) and supported (release time, stipend, etc.) meeting times.

The team might begin by formulating a mission and vision that is congruent with the district's overall vision but emphasizes the LRE guiding principles. The team might then work on a process of "backward mapping" which identifies the barriers within the structures, procedures, and processes that will need to be overcome to achieve those goals (Pumpian & Fisher, 1997). This backward mapping might involve several steps such as:

1. Assessing their district in relation to the vision developed by the team.
2. Setting goals and recommending activities to meet them.
3. Crafting a plan and overseeing its implementation.
4. Evaluating the activities and their impact in terms of student and school.

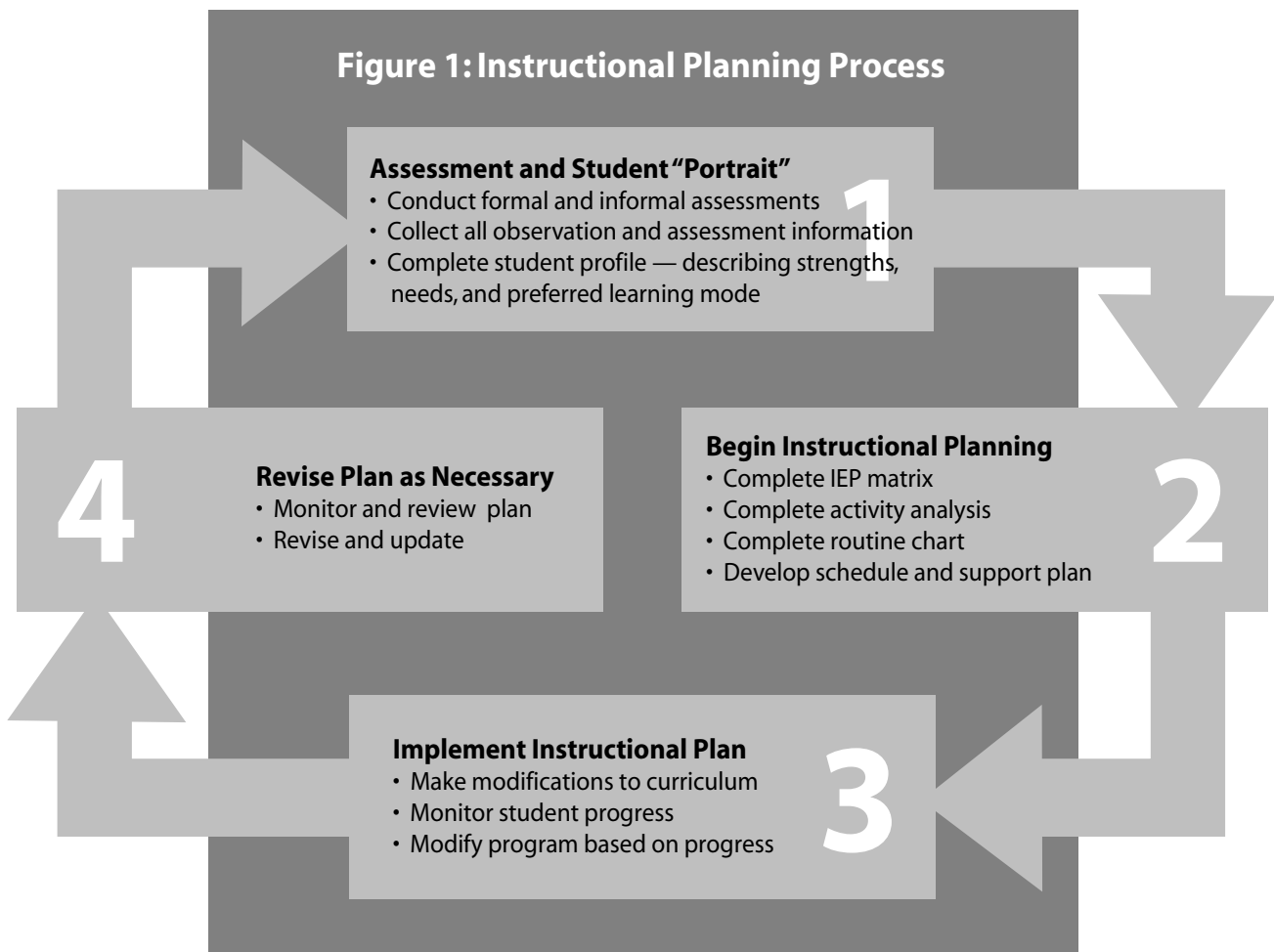
STEP 2:

Conduct a Needs Assessment

As stated previously, numerous needs assessments are available to assist districts and schools with this process, such as the California Least Restrictive Environment (LRE) Self-Assessment and Continuous Improvement Activities (2000) tool in Table 5. This tool was developed by a CDE stakeholder workgroup and is now being piloted in several locations. This self-assessment tool, which has both a District-Level and a School Site-Level form, provides excellent examples of research-based practices that will guide schools and districts in their improvement plans. The self-assessment protocols examine practices around six major components. These areas include:

- ▶ Vision, expectations, leadership, and climate.
- ▶ Policies and procedures that promote LRE.
- ▶ An array of services and program and classroom strategies to facilitate the implementation of LRE for students with disabilities.
- ▶ Accountability systems that reflect high expectations for all students.
- ▶ Teachers, parents, and students working together for better student results.
- ▶ Sufficient numbers of qualified staff.

(See Appendices for a complete example of both the district- and site-level forms.)



The self-assessment tool shown in Table 5 should be used as part of the discussions held by the Stakeholder Improvement Team. The tool contains:

- ▶ **Column 1, Components and Features of LRE**, contains the practices or features that each of the major areas is divided into. These measurable practices help the district identify the essential components of the area.
- ▶ **Column 2, Rating**, the team discusses each of these features and uses a consensus-based process to determine which practices are being implemented appropriately and then rates their site on a scale of 1 (low) to 5 (high).
- ▶ **Column 3, Information to Support Rating is listed by the team**. This would include the evidence that could be used to support the rating the team gave in column 2.
- ▶ **Column 4, Improvement Activities**, the team makes some initial suggestions of what might be done to improve in this area.

As the team reviews the self-assessment tool, discussions will emerge about areas of improvement for the site or district. It is often helpful to have a facilitator assist with these discussions and keep the group focused on the vision.

On the final page of the document, scoring overview, you will average all the scores in a section and briefly describe issues or needs in this area. You will decide the priority of importance of this area and activity and list out the suggested tasks that the team described during their discussions. This will be a summary of the needs identified by the team and the beginning ideas for solving the needs. See Table 6 for an example of the summary sheet.

Table 6. California Least Restrictive Environment Self-Assessment and Continuous Improvement Activities

SUMMARY SHEET			
Practice	Section Average Score	Priority	Improvement Tasks
1 Vision, expectations, leadership, and climate. <i>Issues/needs: Some staff and parents understand philosophy but all need to discuss what it means and how to implement.</i>	3.1	H M L	Training for all staff on vision.
2 Policies and procedures that promote LRE. <i>Issues/needs: Many procedures and policies need to be revised to support placement of students out of special day class.</i>	2.4	H M L	Develop Procedural Guide.
3 An array of services and program and classroom strategies to facilitate the implementation of LRE for students with disabilities. <i>Issues/needs: Need training on instructional strategies for teachers. Need collaborative time for meetings.</i>	1.6	H M L	Training is needed for classroom staff in modifying curriculum. Planning time needed.
4 District accountability systems that reflect high expectations for all students. <i>Issues/needs: Teachers unsure about accommodations. Students with severe disabilities not included in any assessments.</i>	2.3	H M L	Need training in accommodations and assessment.
5 Teachers, parents, and students working together for better student results. <i>Issues/needs: Everyone working in isolation. Too much duplication of effort.</i>	3.1	H M L	Need collaborative team training and time for staff to collaborate.
6 Sufficient numbers of qualified staff. <i>Issues/needs: Staff feel they do not know how to work with some students.</i>	2.7	H M L	Training needed in instructional strategies.

It is also helpful to collect other information about the schools and programs offered throughout the district including information on the expertise available at each site as well as planning for which sites might be most successful as early implementers of the process.

Once the information from the self-assessment tool has been summarized, the beginnings of an action plan have been formed. The team will need to come to consensus on the action items and develop a plan. There are many processes that can be used to develop action plans but one that has been particularly successful in creating a collaborative mind-set is the SODAS process described in Table 7.

STEP 3:

Develop an Action Plan

The use of a problem-solving process to develop solutions for the challenges your team has defined will help to create a way to help the team work through the entire problem and seek a more long lasting solution. There are many creative problem-solving processes but one that you might consider is SODAS.

SODAS*

S = Situation (*define the problem.*)

Do some fact finding at this point by thinking about the following:

- ▶ Who is or is not affected?
- ▶ What is or is not happening?
- ▶ When does or doesn't it occur?
- ▶ Where does or doesn't it occur?
- ▶ Why does or doesn't it occur?
- ▶ How does or doesn't it happen?

O = Options

This is a brainstorming part of the creative problem-solving process. DO NOT JUDGE the ideas at this point. Try to generate as many ideas as possible, REGARDLESS of how silly they might seem. Use phrases or questions to help generate ideas, such as:

- ▶ "In what ways might we...?"
- ▶ "What if there were no obstacles...?"
- ▶ "Who else might have ideas...?"
- ▶ "If I had a magic wand I would...?"

D = Disadvantages

Now, take a look at the options and select those that the team feels are possibilities. What might the DISADVANTAGES be if you implement the option? List them on one side of the paper.

A = Advantages

Using the same selected options as above take a look at the ADVANTAGES of implementing the option. List them alongside the disadvantages.

S = Solution

While looking at the disadvantages and advantages, begin to form your solution to the situation. Several of the options might be combined into the solution.

If you agree to a solution, MAKE A PLAN.

**Adapted from South Dakota Statewide Systems Change/Deaf-Blind Project.*

Table 7 is an example of a completed format using SODAS as a tool.

Table 7. SODAS: Creative Problem-Solving				
SITUATION – Define the problem	OPTIONS – What options do we have	DISADVANTAGES of each option	ADVANTAGES of each option	SOLUTION
<p>Lack of common planning, prep, and collaborative time.</p> <p>Who is affected? Teachers, assistants, students, and parents.</p> <p>What has happened? Meet “on the fly.”</p> <p>When? Mostly before/after school, lunch, breaks.</p> <p>Where? In the hall, teacher’s room, copy machine.</p> <p>Why? Not enough prep/planning time.</p> <p>How? Without planning.</p>	<p>1. Create common prep time.</p> <p>2. Lengthen school day and bank hours for one early dismissal day/week.</p> <p>3. Pay for subs.</p> <p>4. Interdisciplinary block of prep time.</p>	<p>1. Common prep difficult to schedule.</p> <p>2. Transportation issues. Child care issues.</p> <p>3. Costs</p> <p>4. Requires long-term systems change and commitment.</p>	<p>1. Planning time available daily/weekly.</p> <p>2. Weekly whole-staff planning time.</p> <p>3. Flexible planning time available.</p> <p>4. Well thought out process will allow for better planning time.</p>	<p>1. Make a common prep time.</p> <p>2. Explore the possibility of early dismissal one-day per week.</p> <p>3. Explore other resources for time together.</p>

Once solutions have been discussed, it is necessary to put the ideas into a plan of action, which will specifically describe the steps of implementation. Table 8 outlines what should be included in this plan and includes the following:

- ▶ **What** action is necessary?
- ▶ **Who** will be responsible for each step in the plan?
- ▶ **What** is the timeline?
- ▶ **How** will we know if the plan is successful?
- ▶ **Who** else needs to know or be involved in this plan?

REMEMBER! If the first solution does not work, go back to the process. What were some of the other possible solutions? Would one of those work? Keep trying.

Table 8: Action Plan

What action is necessary?	Who is responsible?	What is the timeline?	How will we know if successful?	Who else needs to be involved?
1. Training for all staff on vision.	1. District administration and principal.	1. Completed by 9-01.	1. Training occurs and change noted in pre/post attitude surveys.	1. District administration and LRE taskforce.
2. Develop and implement a schoolwide Positive Behavioral Plan.	2. Site-level team & principal. 3. Site-level team.	2. Completed by 6-02. 3. Completed by 6-02.	2. Site representative on district LRE committee.	2. District administration and LRE taskforce.
3. Training and coaching needed for classroom staff.			3. Site implementation of policy occurs.	3. Entire site staff.

Once a plan is in place, it will be critical that the team continues to meet to review progress and adapt the plan and activities as necessary. Initial planning steps might include training for all staff, selection of sites for early implementation and a similar planning process at these sites for their own planning to meet the specific needs of their students, staff, and families. These initial steps might include:

- ▶ Initial school sites identified and orientation sessions held
- ▶ Professional and parent development/training needs identified and plans defined
- ▶ Resources and staff identified to support sites needs
- ▶ Policy and procedures reviewed for any necessary revisions
- ▶ Short- and long-range plans submitted for district approval

After the initial plans are implemented, the planning teams should meet again to review progress and plan for next steps of implementation. Some of these steps might include:

- ▶ Districtwide parental and IEP team access to information on inclusion
- ▶ Short- and long-term plans initiated
- ▶ School sites represented on district task force and linked with each other
- ▶ Personnel development for school sites, parents and parent groups, specific staff role groups
- ▶ Stakeholder work groups established in areas, i.e., curriculum, personnel development, evaluation, handbook on inclusion
- ▶ Evaluation plans designed and initiated

As implementation continues, the planning process will take on a new purpose, that of systematizing the process. This will include development of policy and procedures that will ensure that the steps that have been used successfully for initial planning and will be added to district and site policies. These ongoing or

This planning process can be used to monitor and maintain initial efforts and to plan for the ongoing next steps as sites become competent in serving all their students.

continuing activities might include:

- ▶ Policy and procedural changes approved and implemented in LRE policy, enrollment/placement, IEP forms, related services delivery
- ▶ Additional schools provide inclusive option each year
- ▶ Inclusive education unified with other educational reforms in the LEA
- ▶ Ongoing data review and feedback used for program improvement/changes in plans
- ▶ Evaluation data reviewed by site teams and utilized for program improvement

This planning process can be used to monitor and maintain initial efforts and to plan for the ongoing next steps as sites become competent in serving all their students. New sites can begin implementation using the same site process but will have the additional resource of the experienced sites as mentors in the process.

Table 9 is an example of a district level inclusion plan developed as a part of the planning process. This plan spells out the specific outcomes of the task force, strategies to reach the outcomes, and how the outcomes will be evaluated.

**Table 9: District Inclusion Plan
Inclusion Task Force (ITF) Subcommittee**

<i>Best Practice Model</i>	<i>Strategies and Activities to Reach Goal</i>	<i>Expected Outcome</i>	<i>Evaluation/How to Measure</i>
1. Inclusive education as an option in every school by 2001.	<p>Enrollment procedures</p> <p>Increase accessibility of buildings</p> <p>Increased training and ongoing information opportunities for all staff and students</p> <p>Increased information available to families; new vehicles for information and training</p> <p>Work two years ahead of time with prospective schools; identify teachers who are mainstreaming who want to move into inclusion</p> <p>Increased access of special education meetings of the Principal and/or ongoing inclusion meetings of the Principal</p>	<p>Any IEP team can access inclusive support at child's home school</p> <p>Students do not have to leave school to obtain special education services</p> <p>Increased school ownership of students and staff involved with special education.</p> <p>School-level adaptations of model to fit site</p>	<p>Presence of inclusive education noted in all school report cards</p> <p>Inclusive option and related information are available through district website</p> <p>Staff development calendars</p> <p>Staff evaluations of trainings on inclusive education</p>
2. Inclusive transition programs (post-high school – 22) are in place.	<p>Task Force plan now for high school students graduating who want inclusive option (students completing IEP, but not high school diploma)</p> <p>Need to define these activities with transition staff</p>	<p>Range of inclusive options: continuing education, work experience for graduates</p>	<p>Transition follow-up data on included students post-high-school</p> <p>Individualized Transition Plans</p>
3. Inclusive preschool options (3-5) available throughout the city.	<p>Task Force works with preschool Program Consultant, etc. to assist in defining, designing, and implementing new and future inclusive options (See #1 above)</p> <p>Need to define these activities with district preschool staff</p>	<p>Variety of inclusive preschool options available</p> <p>Increasing number of kindergarteners coming from inclusive preschools</p> <p>Increase in number of IEPs requesting inclusion as students enter pre-K and K</p>	<p>Numbers of preschool students in inclusive preschools from year to year.</p> <p>IEP face sheets as documentation</p>
4. Inclusive summer programs available.	<p>Develop secondary work and recreation programs</p> <p>Continue inclusive summer school support across age levels</p>	<p>Students have inclusive summer experiences extending their school year; learning and social relationships enhanced</p>	<p>Sample of IEPs</p> <p>Surveys of parents and teachers</p>

Continued

Table 9 (continued): District Inclusion Plan ITF Subcommittee			
Best Practice Model	Strategies and Activities to Reach Goal	Expected Outcome	Evaluation/How to Measure
5. Site-level groups – planning teams in each school.	Utilize existing or develop new group for forward and transition planning; have representative from this group be liaison to district task force	Cohesive planning and oversight of inclusive education implementation at the school level. Staff and families feel supported; increased staff ownership and knowledge	School team meeting minutes; school action plans; sample of schools surveyed; inclusion appears in school site report card each year
6. Transportation matches school calendar, start and end times.	Task Force and Special Education Administrator work with transportation department; hold working meeting on this in 97/98 Work to use general education buses whenever feasible	Reduced transportation costs when using general education buses Students able to participate in full school day	Bus schedules IEPs (transportation category)
7. Student-level planning teams are functioning for each pupil.	Work toward obtaining elementary preparation time for all Set annual calendar of meetings. Use a portion of common planning time Obtain compensation time for paras attending outside hours Utilize portion of grade level/subject matter/conference days/SIP school-site day for planning. Meet as needed according to schedule	Student's participation, support and expectations are clearly laid out and understood by all Adaptations are timely Use portion of common planning at time of secondary level Roles of each staff person clarified Access to advance planning information for curriculum adaptations to be in place on schedule	Sample of IEP objectives to survey achievement Student participation plans, report cards Team minutes Lesson plans Student IEP matrices
8. Information and training is available to all prior to inclusion (grade to grade, school to school) for transitions ongoing.	See Matrix of training needs, content, resources development by Task Force Add to Matrix: teacher, mentor, parent mentors, para-mentor systems, resource teams development New handbook Future web pages Annual calendar of staff development offerings, e.g., full day for future schools in Fall; series after school during year	Increased awareness, knowledge base of staff, students Increased ownership by schools Ongoing support More in-depth planning process available Staffs and parents feel more fully prepared; sites can begin own planning early	Staff surveys Mentorship evaluations Training evaluations Aggregate training evaluation data

Continued

**Table 9 (continued): District Inclusion Plan
ITF Subcommittee**

Best Practice Model	Strategies and Activities to Reach Goal	Expected Outcome	Evaluation/How to Measure
9. Infusion of content within district inservice (e.g., Mathlands) on new curricula.	District-sponsored summer work groups (general and special education to put together adaptation information and strategies across content areas/grade levels) Coordination with Staff Development unit	District curricular inservices are inclusive of relevant information and new strategies, adaptations Curricula more relevant to special needs of individual students	Inservice evaluation data Inservice materials and activities Sample of teacher lesson plans in those areas Individual student participation plans
10. Transition planning across schools & grades.	Design, adopt, and implement specific timelines and activities for advance planning (visits, observations, team meetings, etc.) Investigate vehicles for release time for transition IEPs, visits, etc. Student circles participate in planning	Smoother transitions Information available to teachers in advance Long-range calendar of activities and timelines for each year Higher satisfaction of students, staff, and families	Transition plans in IEPs Survey samples in each category annually
11. Student support networks.	Individualized systems are set up by student planning teams, e.g., <ul style="list-style-type: none"> • circles • maps • tutors • buddies • network • person centered planning • “pit crew” 	Nondisabled students participate with included students in curricular planning, adaptation design, ways to support the learning of one another Friendship development	Samples of: <ul style="list-style-type: none"> • Student schedules • Surveys of students • IEPs • Student meeting minutes
12. Staff share responsibility for all students.	Special education staff (teachers, paras, support-related services) collaborate with general education and provide in-classroom support to all students in conjunction with support to included student Co-teaching units, lessons, subjects Cross-categorical service delivery General education teachers support and instruct students with special needs as part of class	Collaborative classrooms with adults working together Increased ownership of all students Greater parity between special education and general education More support to at-risk students Increased team effectiveness	Lesson plans, schedules Surveys to teachers Compare referral rates to Student Study Team and special education from inclusive classrooms with other classes Team self-survey IEP quality

*Halvorsen, A.T. & Neary T. (2001). *Building Inclusive Schools: Tools and Strategies for Success*. Needham Heights, MA: Allyn & Bacon Publishers, pp. 180-182.

School Level

At the school-site level the process (seen in Figure 2) is quite similar to the district-level process, described in the last section. The school site process begins in Step 1 by establishing a school-identified-team of general and special education teachers, parents, site administrator(s), support staff/related services, and (secondary-level) students to identify both positive practices as well as areas of need for improvement and assistance.

Step 2 utilizes a needs assessment process such as the site level version of the California Least Restrictive Environment (LRE) Self-Assessment and Continuous Improvement Activities (2000) tool (see Appendix). Completing this activity assists the team to identify practices, procedures, and policy issues in need of revision as they move to a new service delivery model. The process also allows the team to discuss possible strategies for achieving its goals and to collect evidence of its existing effective practices. Once the team has completed the needs assessment, and the items have been prioritized, an action plan can be developed to delineate the next steps the site will take in their change process.

Step 3 moves to the development of an action plan based on the needs assessment and prioritization process. A brainstorming process such as SODAS (described in the district process) could be utilized at the site level as well to develop solutions to the issues that arose in the needs assessment. Once strategies have been identified, they should be put into an action plan to be carried out in a strategic manner.

Figure 2 is a flow chart depicting phases of school-level inclusive development from initial steps to continuing activities. These steps are more specifically described in Tables 10 and 11. These recommended steps and practices are provided to assist districts and schools with an action planning process and are based on our work with schools statewide. Readers are encouraged to adapt the specific activities to their local communities.

A Site-Level Plan resulting from a Needs Assessment Process follows in Table 12. This plan was developed using the California Confederation on Inclusive Education Needs Assessment (located in the Appendices) and would be the first step in prioritizing areas for action. A process for prioritizing, brainstorming and action plan development, such as the one described previously in this chapter, would then be utilized to move the team along the change process.

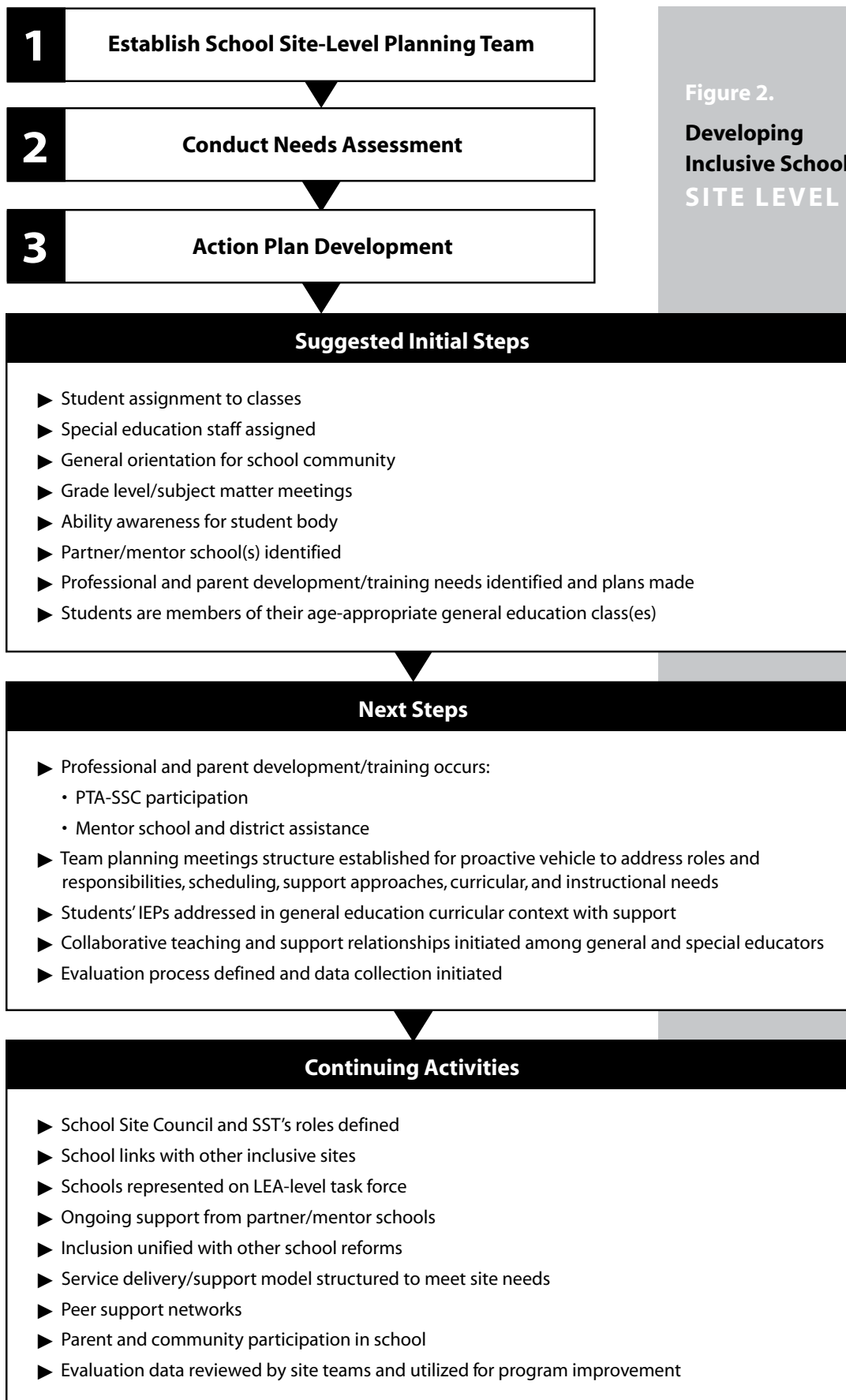


Figure 2.
Developing
Inclusive Schools:
SITE LEVEL

Table 10. School-Level — Elementary School: Phases of Development**Phase 1: Previous Spring or Term**

Students have been assigned to home/magnet school

General and special education faculty meet at grade levels to assign students and build or form heterogeneous classes according to the site's process

School site staff participate in school-level needs assessment to determine their priorities for staff development and assistance

Professional development is individualized to site needs and provided with district support

Site is paired with partner or "mentor" school(s) that have inclusive schooling experience to provide, e.g., faculty orientation to inclusion.

PTA, School Site Council participate in staff development.

Time is provided for specific receiving faculty with students' team members (special education staff and family) who will be supporting students for the purposes of advance planning, e.g.:

- curriculum and instruction
- team members' roles, responsibilities, methods of communication, and teamwork
- schedules of support
- support/co-teaching approaches

Paraprofessionals are interviewed, selected, and familiarized with the school, their roles, and specific information about individual students with whom they will be working

Phase 2: First 3-4 months of school

Special education teacher(s) and support/related services staff work with each grade level to design schedules of support, referral process and plans for teaming, communication and collaboration

Individual planning team meetings are scheduled for the year with families and staff

School Site Council considers how to incorporate inclusive efforts and professional development needs/plans within School Site Plan. Special education is represented on School Site Council

Student Study Team receives professional development on team process, intervention/prevention and ways of coordinating with special education staff for input and support

Specific development activities are designed and implemented for paraprofessionals by special and general education staff in areas such as: classroom role, school procedures and protocol, individual student procedures (e.g., health), curricular modification/adaptation, systematic instruction, positive behavioral support

Partner/mentor school/teams provide support according to parameters set up in Phase 1, e.g., facilitating problem-solving meetings, providing hands-on observation and coaching, and participating in focus groups on site

PTA hosts meetings/presentations on school's approach to inclusive schooling with classroom staff and parents

Inclusive education is ongoing agenda item of School Site Council for proactive oversight and/or site-level inclusion group is established to oversee process and problem solve

Resources (e.g., inclusive education district handbook, curricular adaptation materials, videos, ability awareness media/curriculum) are provided to teachers' library and/or individual classes

Student peer support programs are developed/enhanced, e.g., circles of friends, student curriculum planning meetings, buddy programs, etc.

School is linked with other inclusive schools in district through electronic means (e.g., job-alike listeners, chat rooms) or for periodic topical round tables on subjects such as curriculum and instruction, positive classroom climate, assessment, and grading as selected by teachers

Parents of included students are encouraged/supported to participate in school community (e.g., Site Council, PTA, room parents, other structures)

Structures are designed for evaluating the inclusive process and outcomes, e.g., team satisfaction and functioning, support strategies, student learning

Special educators, related services, and the school staff collaborate across service delivery options to share materials and practices, and to support students

Phase 3: Second Semester

Professional development plans continue with partner/mentor schools and district staff

Planning teams continue scheduled meetings and begin work on transition plans for following year, involving next grade level(s)

Evaluation strategies are implemented and feedback/information/data are obtained from key players/groups to aid in future plans

Table 11. School-Level — Secondary School: Phases of Development**Phase 1: Previous Spring or Term**

Students have been assigned to home or public school of choice

Students are assigned to create heterogeneous grouping of students that allows for all students to have access to the core curriculum classes

School site staff participate in school-level needs assessment to determine their priorities for staff development and assistance related to inclusive education and to develop an Action Plan

Professional development related to implementing inclusive practices is individualized to site needs and provided with district and/or other support

Site is paired with partner or “mentor” school(s) that have inclusive schooling experience to provide, e.g., faculty orientation to inclusion

PTA, School Site Council, and Associated Student Body groups participate in staff development

Time is provided for specific receiving faculty with students’ team members (special education staff and family) who will be supporting students for the purposes of advance planning for:

- curriculum and instruction;
- team members’ roles, responsibilities, methods of communication; and teamwork;
- schedules of support; and
- support/co-teaching approaches

Paraprofessionals are interviewed, selected, and familiarized with the school, their roles, and specific information about individual students with whom they will be working

Student Study Team receives professional development on team process, intervention/prevention and ways of coordinating with special education staff for input and support

Phase 2: First 3-4 months of school

Special education teacher(s) and support/related services staff work with each grade level and subject to design schedules of support, referral process and plans for teaming, communication, and collaboration

Individual planning team meetings are scheduled for the year with families and staff

School Site Council and Associated Student Body consider how to incorporate inclusive efforts and professional development needs/plans within School Site Plan. Special education is represented on School Site Council

Specific development activities are designed and implemented for paraprofessionals by special and general education staff in areas such as classroom role, school procedures and protocol, individual student procedures (e.g., health), curricular modification/adaptation, systematic instruction, positive behavioral support

Partner/mentor school/teams provide support according to parameters set up in Phase 1, e.g., facilitating problem-solving meetings, providing hands-on observation and coaching, and participating in focus groups on site

PTA hosts meetings/presentations on school’s approach to inclusive schooling with classroom staff and parents

Inclusive education is ongoing agenda item of School Site Council for proactive oversight and/or site-level inclusion group is established to oversee process and problem solving

Resources (e.g., inclusive education district handbook, curricular adaptation materials, videos, ability awareness media/curriculum) are provided to teachers’ library and/or individual classes

Student peer support programs are developed/enhanced, e.g., circles of friends, student curriculum planning meetings, buddy programs, Friendship Clubs

School is linked with other inclusive schools in district through electronic means (e.g., job-alike listservs, chat rooms) or for periodic topical round tables on subjects such as curriculum and instruction, positive classroom climate, assessment and grading as selected by teachers

Parents of included students are encouraged/supported to participate in school community (e.g., Site Council, PTA, room parents, other structures)

Structures are designed for evaluating the inclusive process and outcomes, e.g., team satisfaction and functioning, support strategies, student learning

Special educators, related services, and the school staff collaborate across service delivery options to share materials and practices, and to support students

Phase 3: Second Semester

Professional development plans continue with partner/mentor schools and district staff

Planning teams continue scheduled meetings and begin work on transition plans for following year, involving next grade level(s) and subjects

Evaluation strategies are implemented and feedback/information/data are obtained from key players/groups to aid in future plans

Table 12. Site Needs Assessment – Identified High Needs Areas**ENVIRONMENT**

- ▶ **Preschool through 12 inclusive programs have been established for students with disabilities.**
 - 1) Preschool and elementary levels doing well, secondary needs work.
 - 2) Transition from elementary levels to junior high and to senior high difficult.
- ▶ **The school is physically accessible to all students.**
 - 1) No wheelchair doors in school.
 - 2) Restrooms not accessible – not acceptable for changing students.

SCHOOL CLIMATE

- ▶ **Principal is ultimately responsible for program, which includes supervision and evaluation of staff.**
 - 1) Inclusion staff not supervised by site principal.
 - 2) Need clarification of roles and responsibilities for administrators (site and district).
- ▶ **A defined plan or process supports staff in implementation.**
 - 1) Collaboration time is needed for all levels (teachers, assistants, etc.).
 - 2) Need for training time for all staff.
- ▶ **The principal applies the same standards and expectations to special education staff and programs as to general education staff.**
 - 1) Due to part time nature of the inclusion specialist, duties have not been given.
 - 2) Might want to look into this area as it pertains to duties, extracurricular activities, and supervision.
- ▶ **The principal observes special education program/staff.**
 - 1) RSP program but not the inclusion program.
 - 2) This is a district issue and needs to be discussed with district administration and roles of the principal and director need to be addressed.
- ▶ **General and special education administrative staff work collaboratively to address school site-level issues and planning.**
 - 1) Budgets, staffing, assignment of personnel, location of materials all fragmented.
 - 2) No district-level program specialist so director has to address all issues at all levels.
 - 3) Site issues: scheduling of students done during summer when staff is not available. This causes delay in placement of inclusive education students or inappropriate placement.
- ▶ **Inservice programs are inclusive of special education staff.**
 - 1) Generally okay for certificated staff though multiple sites cause issues for attending all site activities.
 - 2) Classified staff not able to attend most inservices. High need for training for assistants.

STAFF INTEGRATION/COLLABORATION***Special educators and general educators:***

- ▶ **Meet at least once a month for collaborative, student-level planning for students who are included.**
 - 1) Collaborative time, common prep time and Dream Team time are used but scheduling is difficult.
 - 2) Time is an issue.
- ▶ **Collaborate to make material and environmental adaptations for students with disabilities to access the core curriculum within general education classes and facilitate participation throughout the school.**
 - 1) Time is an issue in making modifications. It is usually done on the fly.
 - 2) Need a time and schedule to meet with teachers.

Continued ▶

Table 12 (continued). Site Needs Assessment – Identified High Needs Areas

- ▶ **Collaborate to develop systematic transition plans for students who are moving within schools or to new schools.**
 - 1) Need time and process for teachers to meet and plan for next year's students.
 - 2) Transition to junior high from elementary school is difficult. Need to work on process.
- ▶ **Work to provide safe, orderly and positive learning environments for all students.**
 - 1) Some safety issues with untrained personnel, need training and transition for fragile students.
 - 2) Need to develop process for training of all staff on safety issues.
 - 3) Need to work on a process for communication.
- ▶ **Establish high expectations for all students.**
 - 1) Teacher dependent.
 - 2) Need training of all staff in how to "stretch" all students. Need to coordinate need of students to IEP goals. Need to understand how to mesh these.
- ▶ **Employ age-appropriate materials for instruction.**
 - 1) Issue because materials are not available for inclusion students.
 - 2) Time and responsibility of making modifications is an issue.
 - 3) Need high-interest and low ability materials.
 - 4) Access to core curriculum is an issue.
- ▶ **Individualize activities for students, design and utilize systematic instructional strategies, and monitor progress systematically.**
 - 1) Same as above.
- ▶ **Encourage and support friendship development for all students and develop systems to promote natural peer supports.**
 - 1) Done informally for some students.
 - 2) Need to make a part of overall system.
 - 3) Need ability awareness activities.

Special Educators:

- ▶ **Attend faculty meetings and parent conferences with general education staff.**
- ▶ **Participate in regular supervisory duties.**
- ▶ **Participate in extracurricular responsibilities.**
 - 1) Multiple sites an issue for attending meetings.
 - 2) Need to develop a process to address this at the policy level. How will information be shared when staff is not able to attend, etc.
- ▶ **Follow school protocol: keep principal or appropriate administrator informed on an ongoing basis.**
 - 1) Need formalized communication process between general educators, special educators, support staff and administration.
- ▶ **Adequately prepared and supported to effectively teach students with disabilities in their classes.**
 - 1) Time to meet is an issue.
 - 2) Training necessary.
 - 3) Need to develop process for sharing information on student's IEPs.
 - 4) Need to allow for flexible scheduling of student.

STUDENTS

- ▶ **Students' IEPs and instructional programs are based upon individual student needs (work study, community-based instruction, mobility, etc.).**
- ▶ **Students' IEPs include necessary support services and equipment.**
 - 1) Committee will work on an overall review of all students.

Early Childhood Inclusive Education

Inclusive practices for young children are implemented in different ways and within different settings than their counterparts in K-12. Both physical and philosophical partnerships between early childhood education and early childhood special education providers are necessary. While both groups may agree on many areas, certain beliefs need to be clearly defined and discussed before both programs can work toward a cooperative relationship.

The following is a position brief developed by the Division of Early Childhood (DEC), Council for Exceptional Children, and approved by the National Association for the Education of Young Children (NAEYC). The position is widely accepted by both the Early Childhood Education field and the Early Childhood Special Education field.

Council for Exceptional Children POSITION ON INCLUSION

Inclusion, as a value, supports the right of all children, regardless of their diverse abilities to participate actively in natural settings within their communities. A natural setting is one in which the child would spend time had he or she not had a disability. Such settings include, but are not limited to, home and family, play groups, child care, nursery schools, Head Start programs, kindergartens, and neighborhood school classrooms.

DEC believes in and supports full and successful access to health, social service, education, and other supports and services for young children and their families that promote full participation in community life. DEC values the diversity of families and supports a family-guided process for determining services that is based on the needs and preferences of individual families and children.

To implement inclusive practices, DEC supports (a) the continued development, evaluation, and dissemination of full inclusion supports, services, and systems so that the options for inclusion are of high quality; (b) the development of preservice and inservice training programs that prepare families, administrators, and service providers to develop and work within inclusive settings; (c) collaboration among all key stakeholders to implement flexible fiscal and administrative procedures in support of inclusion; (d) research that contributes to our knowledge of state-of-the-art services; and (e) the restructuring and unification of social, education, health, and intervention supports and services to make them more responsive to the needs of all children and families.

Source: Division for Early Childhood (DEC) of the Council for Exceptional Children; Adopted April, 1993; Updated February, 1998; Endorsed by the National Association for the Education of Young Children (NAEYC); November, 1993.

Early childhood education programs are based on the widely held philosophy of developmentally appropriate practices (DAP). This approach focuses on the child as an active participant in the learning process; a participant who constructs meaning and knowledge through interaction with others, friends and family, materials, and the environment. The teacher is an active facilitator who helps the child make meaning of the various activities and interactions encountered throughout the day (Houser & Osborne). These practices include:

- ▶ Developmental evaluation of children for program planning.
- ▶ Fully qualified staff.
- ▶ High ratio of adults to children.
- ▶ Strong relationship between home and center.
- ▶ Child-initiated activities as a primary means of learning.

Early childhood special education is based on the philosophy that comprehensive intervention should be delivered early to maximize the child's learning potential. These practices are based on individualized strategies to increase the child's involvement in the learning. Widely accepted practices include:

- ▶ Family-centered support and involvement.
- ▶ Support services that focus on functional outcomes for the child and that are developed as a result of an appropriate, multidisciplinary assessment.
- ▶ Multidisciplinary services that are provided in the early childhood program and are accomplished through teaming and collaboration.
- ▶ Planning for transitions to future environments as an ongoing process.

To combine the two philosophies it is helpful to define the role each will take in the program. Developmentally appropriate practices are recommended to design an environment that it is both age-appropriate and supportive of all children's needs. At the same time, the design of developmentally appropriate programs may not fully address the needs of individual children, particularly children who need specific intervention strategies. Early childhood special education practices can be designed to support the developmentally appropriate program by bringing in individualized strategies to address the learning needs of students needing additional assistance. These practices include:

- ▶ Directly prompting practice on individually targeted skills, based on functional behavioral outcomes.
- ▶ Reinforcing children's responses.
- ▶ Collecting data to monitor children's progress and make intervention changes (Udell, Peters & Templeman, 1998).

A suggested set of first steps in achieving collaborative, inclusive early childhood programs appears in Table 13.

Developmentally appropriate practices are recommended to design an environment that is both age-appropriate and supportive of all children's needs.

Table 13. Early Childhood – First Steps

Phase 1: Year One

► **Request presented for preschool inclusive options:**

► **Form Stakeholder group to explore options, including representatives of:**

Families

Special education administrators (SELPA, County Office, District)

Special education and general education early childhood teachers

Preschool administration(s) (May include Child Development Centers, Head Start, private preschool providers, State preschool)

Related services providers of District, etc. (e.g., speech and language, occupational and physical therapy)

Other relevant agencies: Infant/toddler program providers, Regional Center, Departments of Health and Developmental Services

► **Complete needs assessment with Stakeholder Group.**

► **Examine needs, priorities and opportunities:**

Needs in terms of family requests, student numbers

Facility needs/potential modifications required

Licensing considerations and parameters

Professional development and collaborative planning time needs

Parent training and information needs

Transition planning process

Phase 2: Year One

► **Determine availability of local options:**

Identify range of settings in community

Survey providers by telephone/e-mail/mail to determine appropriateness of setting to match student needs

Visit local programs

Identify preferred practice sites to visit in local and other communities to obtain further information about establishing collaborative programs

Contact other experts to assist in developing new options, e.g., Least Restrictive Environment Initiative Project, California Department of Education staff, California Early Intervention Technical Assistance Network (CEITAN), SEEDS, universities with Early Childhood and Special Education Programs

Determine match between student needs and program options

Establish priority action plan including resources needed and sources available to meet these needs

Design mechanism for collaborative site planning to meet all preschoolers' needs

Establish Memoranda of Understanding or other appropriate administrative agreement delineating purpose of collaborative effort, roles and responsibilities of parties, resource and staff sharing, etc.

Arrange for ongoing collaborative planning time for preschool general and special education staff and families for each identified student to initiate and continue an individualized student planning process

Policy and Procedures for Local Districts

Implementing inclusive education typically requires that districts “do business differently.” Procedures for placement, provision of services, roles and responsibilities of staff, and even the basic overall philosophy or mission of a district might look different. Many districts have responded to this by developing procedural guides for inclusive education or they have made revisions or additions to existing procedural guides to address the changes and issues that arise. Some districts have revised existing Board of Education Policy to define this new service delivery process and to systematize these new processes as well. San Francisco Unified School District (SFUSD) revised its Board of Education LRE Policy to address inclusive education. They have also systematized procedures and teacher contract language, and have defined roles and responsibilities within the SFUSD handbook on inclusive education. The Board of Education Policy on Least Restrictive Environment adopted in 1996 follows.

Table 14. Least Restrictive Environment

It is the intent of the San Francisco Board of Education to comply with both Federal Law and the State Master Plan governing the education of students receiving special education services in the least restrictive environment. It is also the policy of the Board of Education that programs and services for these students be made available which comply with the prevailing laws and regulations. Therefore, the SFUSD’S commitment to the education of students with disabilities is supported by the belief that individuals have the right to receive their education in chronologically age-appropriate regular school classrooms with their non-disabled peers, with appropriate supplemental supports and services as described by the individual education plan (IEP). As is further delineated in federal and state statutes, education in an environment other than the general education class should be considered by the IEP team only when it has been determined that these specialized supports and services are inadequate or unsatisfactory to meet the student’s needs. Toward this end, an array of services and placement options is made available within the SFUSD to meet students’ IEP needs for special education and/or related services in the least restrictive environment including:

- ▶ General education classes
- ▶ General education classes with support and services
- ▶ Resource Specialist services
- ▶ Designated instruction and services
- ▶ Special classes
- ▶ Nonpublic, nonsectarian school services
- ▶ State special schools
- ▶ Programs and services for students identified for special education will include the following components to ensure that these options for the least restrictive environment exist.
- ▶ Mainstreaming opportunities occur when students whose primary placement is a Special Day Class attend and participate in general education classrooms for some segments of the instructional day, with varying levels of

The Oakland Unified School District (OUSD) has included the following Inclusion Policy Bulletin in their Inclusion Policy Bulletin, Table 15, which is excerpted below.

Table 15. Inclusion Policy Bulletin

DEFINITION

Inclusion is a program option that enables students with disabilities to attend the school and classroom they would attend if they had no disability. Support and services are brought into the general education classroom to meet the unique needs of the student with disabilities.

Student Eligibility/Placement

Inclusive education is a placement not a label. More specifically, federal law (IDEA – Individuals with Disabilities Education Act) specifies that within the best interests of a child, he/she shall be placed in the least restrictive environment (LRE). Disability type or severity of disability does not preclude involvement in inclusive education. The school district will offer inclusion to all students with severe disabilities who live in the geographical areas of (or who have received district transfers to) the inclusion school sites. Placement in inclusive education programs shall also be determined by the students' IEP team. The site administrator, in consultation with the inclusion teacher when possible will place the inclusion student in an age appropriate classroom. Inclusion students shall advance with their classmates to the next grade level.

Inclusive Education Task Forces

As a district moves to begin providing inclusive education, one of the first steps recommended is to create a district-level cross-constituency inclusive education task force or stakeholder group. The purpose of this task force is to assess the current status of students' access to general education and develop plans to build access where it is lacking, and revise or recommend policy and procedures to support and systematize inclusive education. It is crucial that membership on this task force is representative of all stakeholders who will be impacted by implementation of inclusive education. Members are asked to serve as liaisons to their peers to communicate the work of the task force and to solicit input and suggestions to bring back to the task force. Though membership will vary based on district structure, it is recommended that the following groups be represented:

- ▶ District-level administrators (general education and special education)
- ▶ Site-level administrators (principals/assistant principals)
- ▶ Teachers (general education and special education)
- ▶ Designated Instructional Services (DIS) personnel and transportation
- ▶ Teacher's association representative
- ▶ Paraprofessionals
- ▶ Parents/family members
- ▶ Students (when appropriate; e.g., for secondary level)
- ▶ Other agencies (when appropriate, especially when planning for early childhood programs)
- ▶ Other

The Inclusive Education Task Force typically meets at least once a month for one to three hours beginning 6-12 months prior to implementation and continuing as inclusion develops. Meeting times can vary between after school (voluntary) meetings to longer time periods using release time and/or summer stipends for work groups (Halvorsen and Neary, 2001). A good beginning activity for the group is the development of a mission and goals that are consistent with the district's overall vision. This will help to focus the group on outcomes for their work and will define what they are going to do. Identification of current practices, issues, and barriers will be necessary to determine what needs to be done. This can be done with the completion of a needs assessment, such as the one developed by the California Confederation on Inclusive Education. This will assist the task force in determining what policy, procedures, and practices will need to be changed or added. The needs assessment should examine all areas of the system such as:

- ▶ Policy
- ▶ Accessibility and transportation
- ▶ Collaboration, including professional development/preparation
- ▶ Climate
- ▶ Student assignment procedures

Once the mission, goals, and needs assessment have been completed, the group will then create an action plan and timelines for developing the new/revised procedures for submission to the district. When the new procedures have been completed and approved the committee should develop recommendations for policy for approval by the Board of Education. Districtwide training needs should also be determined and a plan for meeting these needs completed, within the context of the district's overall personnel development plans.

A process that has been successfully used by several cross-constituency groups was described by Halvorsen and Neary (2001). The activities include:

- ▶ Assessing their district and/or sites in relation to the vision.
- ▶ Setting goals and recommending activities to meet them.
- ▶ Crafting a plan and overseeing its implementation.
- ▶ Evaluating the activities and their impact in terms of student and school outcomes.

The district-level task force will assist in the selection of the sites that will implement inclusive education. Once sites have been selected, a site-level inclusive education committee should be established at each site. Membership on these teams should be representative of the stakeholders at the site and the school may choose to utilize an existing group such as the school site council for this purpose. The site-level teams should also complete a school-level needs assessment. The needs assessment should examine issues of:

- ▶ School environment (accessibility, logistical issues, scheduling, etc.)
- ▶ School climate (ownership of students, relationship of staff, etc.)
- ▶ Team collaboration among staff and families
- ▶ Student planning and support

The site team will then define a plan for activities to assist their site in implementing inclusive education. These activities might include participation in districtwide personnel development activities as well as site specific activities. The district and site plans contained in this chapter illustrate examples of this.

Teacher's Association Guidelines

One of the policy areas the district task force often deals with is recommendations for contract language. Many districts across the state of California have negotiated language in their certificated contracts that address issues of inclusive educational practices. Following are examples of negotiated contract language from two districts.

San Francisco Unified School District (SFUSD)

8.8 Inclusion Programs

- 31.8.1 An inclusion student is an IWEN who may be eligible for placement in a special day class assigned to an age-appropriate general education classroom for the same number of instructional minutes as his/her peers.
- 31.8.2 The Union and the District agree that the successful initiation and implementation of Inclusion Programs requires cooperation, planning, preparation, and training of teachers and support staffs. Therefore, Inclusion Programs at specific schools or sites shall be initiated through the IEP process. It is the intent of the Special Education Department to provide training and support as needed. (31.8.3) Except in unusual circumstances, a school or site initiating an Inclusion Program shall establish an Inclusion Planning Team consisting of at least the Inclusion Support Teacher, the general education teacher(s) receiving the identified inclusion student(s) and the administrator.
- 31.8.4 The parties recognize that the successful placement of an Inclusion student incorporates such components as advanced notice consultation. As appropriate: review of IEP documents, consideration of classroom environment(s), necessary additional training, and provisions for appropriate support services. (31.8.5) The implementation of an Inclusion Program shall not be utilized as a way to achieve a reduction in staff.
- 31.8.6 The Inclusion Support Team shall consist of the Inclusion Support Teacher and the paraprofessionals assigned as additional classroom support as specified in the student's IEP. The caseload assigned to the Inclusion Support Team shall not exceed the class sized specified in Article 9.5.7 of the Contract.

Oakland Unified School District (OUSD)
Article XXI – Section 15: Full Inclusion Education

- A. Definition: The full-time enrollment, as prescribed by IEP, of a Special Day Class student in a general education classroom, which is not staffed by a full-time Special Education Teacher.
- B. General Provisions:
 - 1. The full inclusion student shall count as part of the general education teacher's class size roll.
 - 2. The general education teacher shall receive a copy of the student's IEP.
 - 3. Any full inclusion student with an IEP shall be included in the Special Education case carrier's caseload.
 - 4. The Special Education case carrier in consultation with the general education teacher(s) is responsible for providing program guidance, including orientation to Instructional Assistants/Aides to the Handicapped assigned to their programs.
 - 5. The Special Education case carrier in consultation with the general education teacher(s) shall submit to the Site Administrator and appropriate Program Manager a recommended work schedule and work responsibilities for any Instructional Assistants/Aides to the Handicapped assigned to their program.
 - 6. It is the intention of the District to continue the practice of planning full inclusion placements in such a way that no more than two full inclusion students are normally placed in any one self-contained general education classroom.
 - 7. It is the intention of the District to assign full inclusion students to case carriers who have the necessary competencies to meet the needs identified in the IEP.
 - 8. The site principal, upon receiving a copy of the IEP, shall assign a full inclusion student to a general education classroom. Among other factors, the assignment shall take into consideration physical space needs of the student, scheduling, curriculum designs, existing classroom composition and the unique needs of the student. The Special Education case carrier shall make available to the principal any additional pertinent information regarding the student which may have a bearing on placement. Any general education teacher who wishes to volunteer to teach a full inclusion student may have such a request considered as one of the placement factors.
 - 9. This is for information only. A teacher may request an IEP review to be held pursuant to California Special Education Code Section 56343.
 - 10. Under the direction of the site administrator and in consultation with the appropriate Special Education Program Manager, the Special Education case carrier and the general education teacher(s) will develop a plan for the support of each general education teacher serving a full inclusion student (for example, release time via a rotating substitute of one day per month).
 - 11. Preference shall be given to the use of single grade classrooms as one of the primary factors in selecting placements for full inclusion students.

School reform and personnel development must occur in tandem, and development activities must reinforce the new forms of teacher involvement that have been identified in restructured schools.

Personnel Development Strategies

When implementing any new educational practice, personnel development is a critical element in the success of implementation. In the section on First Steps, we have included one district's overall action plan that grew from the needs assessment process. Personnel development is a critical component of that plan. Research-based practices which ensure effective personnel development were defined in an issues brief by McGregor, Halvorsen, Fisher, Pumpian, Bhaerman & Salisbury (1998). They note that school reform and personnel development must occur in tandem, and development activities must reinforce the new forms of teacher involvement that have been identified in restructured schools. Berends & King (1994) describe some of these roles and responsibilities:

- ▶ Staff participate in training design that is based on their local needs and
- ▶ Teachers function in differentiated roles including mentoring, peer supervision, collegial planning, curriculum development and policy making.

To address these needs, McGregor et al. (1998) suggested that we use our knowledge about adult learning as well as the empirical base on staff development to design training that is:

- ▶ Based on research, best practices, and needs assessment;
- ▶ School-focused, with emphasis on both individual and organizational development;
- ▶ Directed by a cohesive school-site plan; and
- ▶ Embedded as much as possible within the job of teaching, through participatory learning such as coaching, study groups, and peer observation.

The National Staff Development Council defines standards for staff development. These include standards for the context, the process, and the content of staff development.

- ▶ Requires and fosters a norm of continuous improvement.
- ▶ Requires strong leadership in order to obtain continuing support and to motivate all staff, school board members, parents, and the community to be advocates for continuous improvement.
- ▶ Is aligned with the school's and the district's strategic plan and is funded by a line item in the budget.
- ▶ Provides adequate time during the work day for staff members to learn and work together to accomplish the school's mission and goals.

In addition, Halvorsen and Neary (2001) noted that personnel development is one essential support for the change process and its use implies two additional necessary supports: **Time** and the **financial resources** for time and training, as well as for materials and related activities, such as mentoring, classroom observations, attendance at relevant conferences, or work on curriculum design teams.

Several creative ways that schools can "find" common planning time are through "block scheduling" at the middle or high school, or "banking" minutes toward one shortened instructional day at any level. Teaching is a multidimensional

job and we require people to work collaboratively with others. Therefore, we must work toward embedding personnel development and planning time within the contracted day, while recognizing that all professionals will contribute significant portions of their time as well.

Financial Support to professional development is always an exercise in problem solving. As Halvorsen and Neary noted, “Start-up costs are associated with the marketing and initial implementation of any new product or business activity, but we sometimes fail to acknowledge this reality within education, particularly as it relates to innovation or change” (2001).

When we do not provide the necessary financial supports to accomplish change strategies we further endanger progress (Halvorsen and Neary, 2001). Bridges (1991) described all transitions as having a beginning, a neutral zone, and an ending. We tend to focus most of our energy and resources on the beginning of the process and too little on the neutral zone, that time when we are not yet established. The honeymoon is over and Bridges (1991) compared the neutral zone to a period of “wandering in the desert.” People are especially vulnerable at this time — anxious and full of self-doubt. If we do not find ways to support them as they face the real problems of implementation, we can expect that there will be a strong tendency to return to what was or for the whole process to be “hijacked” by new alternatives that promise the necessary support and positive outcomes.

Think about weight loss programs. Imagine that the new one you have subscribed to requires changing almost all of your current eating habits—when, where, what, and how much you eat. You begin with great enthusiasm and a specific goal of losing 20 pounds in six months. You attend orientation sessions, group meetings, and food preparation classes. You lose half the weight in the first two months and then your weight loss starts to slow down. There are no meetings going on for the people like you. Weigh-ins occur only monthly, with brief staff intervention. You don’t want to go back to meetings with people who just started because they don’t have the problems you have. Nothing in the information or material you received tells you how long to expect that this slump might last. You think maybe you’re alone in this problem. Along comes a friend who tells you about her herbal remedy and all the weight she’s lost. You switch over to her plan, delighted to have some peer support. The herbal concoctions promise much. A year later you have regained most of the initial weight loss.

Recidivism is a risk in all kinds of changes but is most likely to occur during the neutral period as new problems arise and anticipated support is absent. The inclusive change process must build in these supports from the outset, so that participants have a place to turn, to problem solve, to try out ideas. This support may take a variety of forms, and examples are listed in Table 16, adapted from Halvorsen & Neary (2001). Each of these strategies is job embedded. In other words, teachers, staff, and parents are no longer subjected to “go and sit and get” types of passive “inservice” but rather are actively constructing their own learning through a series of participant experiences much as their students in constructionist classrooms.

Table 16: Job-Embedded Support Strategies for the Neutral Zone and Beyond***School Site Level***

- Collaborative teaching or planning teams with consistent common planning time.
- Reflective practice group facilitated by mentor experienced with inclusion.
- Released time to visit inclusive classrooms on-site or in other schools and to attend their collaborative meetings.
- Site- or grade-level monthly or more frequent meetings to monitor change process.
- Listserve to facilitate teacher communication within and across schools.
- Summer retreat or institutes for teams of school faculty, parents, others from the school community.

District Level

- Allotment of special grants or funds to schools engaged in inclusive restructuring (through competitive proposal requests).
- Provision of ongoing teacher discussion groups with open access through district teacher center.
- Ongoing needs assessment and responsive personnel development offerings.
- Provision of funds to school sites to design their own personnel development plans.
- On-line e-mail teacher networks or list serves with chat room access and recommended electronic resources and links.
- Leadership academies and ongoing support connecting principals and other school leaders.
- Role-alike sessions for various personnel and parents facilitated by their role peers.
- Teacher leaders and teams/schools identified and supported to provide assistance to other schools.

Adapted from Halvorsen, A. & Neary, T. (2001) *Building Inclusive Schools: Tools and Strategies for Success*. Needham Heights, MA: Allyn & Bacon, p. 175.

The actual content of these personnel development experiences may vary both as a function of the person's role (teacher, parent, administrator, related service provider) and of the current implementation status of inclusion at their school sites. Professional development designed for school or student-level teams has yielded very positive results for schools initiating inclusive services (Villa & Thousand, 2000; Halvorsen & Neary, 2001).

A needs assessment utilizing tools such as the Site Level LRE Self-Assessment and Continuous Improvement Strategies Protocol (CDE, 2001) can help to identify key content areas to be addressed through a mix of strategies including those in Table 12 as well as more formalized interactive seminars or round tables. Table 17 contains a listing of recommended content areas to address over time when inclusive services are being initiated.

TABLE 17: Professional Development Content Areas for School Teams

<i>Differentiated Instruction for ALL Students</i>	<i>Resource Structuring to Meet Diverse Needs</i>
Multilevel, standards-based instructional design and modifications	Innovative service delivery models
Peer supports and relationships	Co-teaching approaches
Positive schoolwide classroom climate and supports	Team processes for individualized and classwide planning
Collaborative and active learning	Problem-solving processes

Ways for Districts and Schools to Improve and Evaluate Practices

Tools such as the ones described in this chapter are an initial step in a systemic process to provide inclusive options for students with disabilities. The next steps are defining strategies and identifying local resources, such as creative ways to find grade level planning time, opportunities for professional development, new technology, or enhanced curricular materials. Manual 2 provides more detail on this process.

Clearly, districts and schools need to have defined expectations or outcomes in their inclusive plans so that results can be measured in both an ongoing manner with changes made based on data collected and for summative purposes such as Focused Monitoring, Program Quality Reviews or School Accountability Report Cards and most importantly, to demonstrate the impact of these practices for students, families, and staff. The needs assessments presented are one such pre-post measurement strategy. There is a host of other ways to evaluate program effectiveness and student outcomes, using, for example:

1. The IEP Evaluation Instrument (Hunt, Goetz & Anderson, 1986), a validated instrument for examining the quality of IEP objectives keyed to documented best practices in the instruction of students with moderate-severe disabilities.
2. The IEP Evaluation Tool (Lipton & Hunt, 1999), designed to assist in determining the presence of IDEA '97 requirements within all students' IEPs.
3. District-developed consumer surveys for feedback from parents, teachers, principals, paraprofessionals, and others, such as those developed by Colusa County Office of Education (1992) and San Ramon Valley Unified School District (1994-1999).
4. Perceptions of Achievement Scale (Halvorsen, Nearly & Hunt, 1994), a tool for IEP teams to utilize in examining student outcomes.
5. Cost effectiveness evaluation strategies such as the Inclusion Cost Analysis Scale (INCAS) developed by Piuma (1994) and utilized in a California pilot study by Halvorsen, Nearly, Piuma and Hunt (1996).

